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ABSTRACT

This report deals with studies on utilization of the baccalaureate-level practitioner in social work. It makes available information on the needs of social work practitioners and social work educators in order that better communication and understanding of each group's needs may be developed. The studies reported on include: "The Midway Project on Organization and Use of Public Assistance Personnel"; the "Study on Staff Utilization in the Foster Family Care Division"; the "Utilization of Social Work Personnel Project"; the "Study on the Use of Social Work Associates"; and the "Project on the Complexity-Responsibility Scale." Also included is a report of a special Task Force on Manpower Utilization organized under the Syracuse University curriculum-building project. (Author/CS)

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Undergraduate Social Work Education for Practice

. . . A REPORT

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MANPOWER RESEARCH ON THE UTILIZATION OF BACCALAUREATE SOCIAL WORKERS:

IMPLICATIONS FOR EDUCATION

Robert L. Barker and Thomas L. Briggs, Editors

A Report of
The Undergraduate Social Work Education Curriculum Building Project
Conducted By
Syracuse University School of Social Work
Under Contract With
The U.S. Veterans Administration

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Letter of Transmittal

JUNE 1, 1971.

DIRECTOR, *Education Service (152),*
Department of Medicine and Surgery,
Veterans Administration Central Office,
Washington, D.C. 20420

Syracuse University School of Social Work herewith transmits to the Veterans Administration the manuscript entitled *Manpower Research on the Utilization of Baccalaureate Social Workers: Implications for Education.* This volume and a companion volume entitled *Undergraduate Social Work Education for Practice: A Report on Curriculum Content and Issues* constitute the final reports of the project Manpower Research and Curriculum Building in Social Work. This program was conducted by the University supported by Contract EMI 69–00601 under an exchange of medical information agreement with the Department of Medicine and Surgery.

It is our belief that these documents will contribute greatly to improve social work participation in the delivery of health services by focusing on the education required for practice at the baccalaureate level. The timeliness of this material should be especially noted. During the course of this program the National Association of Social Workers took action to admit into full membership graduates of recognized undergraduate programs. This has further "professionalized" this level of practitioner and spotlighted the need to more specifically explicate the curriculum necessary to prepare these personnel for direct practice. In addition, the Council on Social Work Education has strengthened standards for undergraduate programs to ensure more professional content at this level. The material developed by this project should enable undergraduate departments to more effectively respond to this need.

Finally, we have noted during the past two years that many agencies including the Veterans Administration have moved to utilize BA-level practitioners on a larger scale. Improved education for these individuals can only mean better services to individuals.

Sincerely,

THOMAS L. BRIGGS,
LESTER J. GLICK,
Project Co-directors.

Foreword

In the spring of 1969 Syracuse University School of Social Work received a grant from the U.S. Veterans Administration to conduct a project on "Manpower Research in Undergraduate Social Work Curriculum-Building." The present work is one of two companion volumes developed as a part of this project. It deals with studies on utilization of the baccalaureate-level practitioner in social work. The companion volume, *Undergraduate Social Work Education for Practice: A Report on Curriculum Content and Issues,* offers suggestions for curriculum development in undergraduate social work programs to enhance the professional competence of the baccalaureate social worker.

The criticism most frequently made of social work curriculum planning is its lack of orientation to the actual needs of practitioners. It is often alleged that social work educators—who are charged with curriculum planning—and social work practitioners—who are charged with providing services—do not communicate with each other enough to know fully what each other's needs and problems are. Such a lack is manifested in the development of formal training programs that are not designed to educate practitioners for the work they will actually be called upon to do. The fault does not lie in a lack of information. If anything, there is so much information available that it is overwhelming. The problem is the inaccessibility of such information which is buried in a mass of research reports that are highly detailed, complex, and filled with data about concerns not immediately relevant to curriculum planning. When information is vitally needed and available, but relatively inaccessible, an extremely important objective is to find ways of making it available to those who can use it.

The purpose of this volume is to make such information available to curriculum planners on a concise, systematic, and relevant basis. The information will be obtained from the findings of major research and demonstration projects conducted or concluded since 1965 on social work manpower utilization. It will be gleaned from written papers and projects reports, as well as from supplemental information obtained from personal interviews with the researchers and reexamination by researchers of their raw data. The purpose, in sum, is to accumulate existing data and to make it more readily usable by curriculum planners.

To achieve these goals several procedures were followed:

1. A "research of the researches" was conducted. The project staff systematically selected the major studies completed since 1965 that dealt with social work personnel utilization and had relevance for undergraduate social work education.

2. After each study was selected, the major researchers concerned were asked to review their findings, examining their methods, raw data, and conclusions to extract whatever might be useful for curriculum planning.

3. The project staff communicated with curriculum planners to determine what kinds of questions were uppermost in their minds and what information about practice they needed to facilitate future planning.

4. These questions and concerns were then translated into a series of questions that were presented to the researchers as a way of focusing their inquiries into their own data.

5. Based on the answers to these questions, the researchers prepared formal statements containing those parts of their findings that would be useful for curriculum planning.

6. These statements were presented by the researchers to the curriculum planners at a conference and workshop in which personal interchange was possible.

7. The formal statements and appropriate commentary by the curriculum planners were prepared for this volume.

8. Work was begun on a companion volume to the present one that would be directly concerned with curriculum planning for social welfare personnel at the undergraduate level. Toward this end, several task forces, each concerned with different project aspects, met and deliberated.

9. Finally, an open meeting was scheduled to present to the field the findings of the Syracuse University project.

The manpower research studies reported on here are "The Midway Project on Organization and Use of Public Assistance Personnel," sponsored by the University of Chicago School of Social Service Administration, Catholic Social Services of Wayne County's "Study on Staff Utilization in the Foster Family Care Division," the National Association of Social Workers' "Utilization of Social Work Personnel Project," the U.S. Veterans Administration's "Study on the Use of Social Work Associates," Family Service Association of America's "Use of the Social Work Team with Aging Family Service Clients," and Syracuse University's "Project on the Complexity-Responsibility Scale." Also included as an epilogue is a report of a special Task Force on Manpower Utilization organized under the Syracuse University curriculum-building project.

The project staff is indebted to many who have made this project possible. All cannot be mentioned, but we would like to recognize a few. First, of course, we wish to acknowledge the support of the Veterans Administration, which funded this endeavor, and especially Delwin Anderson, director, Social Work Services, Veterans Administration Central Office, and Robert Shamaskin, chief, Program Management Division, Education Service, Veterans Administration Central Office, who offered guidance and encouragement and helped facilitate cooperative relations between the university and the funder. We are also grateful to Dean Walter E. Beattie, Jr., of the Syracuse University School of Social Work, who counseled the project staff and opened up administrative channels to enable the project to move ahead.

Special appreciation has to be extended to Cordelia Cox, who served

as chairman of the project advisory committee and whose wisdom and vision was helpful during all stages of this endeavor.

The authors included in this volume have made a real contribution to the field and we are warmly appreciative of their efforts.

To the co-editor of this volume, Robert L. Barker, who served as special research consultant to the overall project, we pay particular tribute.

To our secretaries, Elaine Emerson and Marian Dykshoorn, who typed the many corrections in the manuscript, we say thanks. And last but not least, we are indebted to Patricia Ann Lynch, our technical editor, for her patience and fine workmanship in getting this material in good order.

THOMAS L. BRIGGS,
LESTER GLICK,
Project Co-directors.

Syracuse University,
June 1971.

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Part One

THE BACCALAUREATE SOCIAL WORKER: AN INTRODUCTION

Robert L. Barker and Thomas L. Briggs [1]

The concern of this volume is the social worker whose formal training ends when he receives a baccalaureate degree. Focus is on what such a person needs to know and what skills he must acquire if he is to deliver social services effectively with no other academic preparation. This concern arose because, despite the serious need to know how to provide a better education for baccalaureate social workers (hereinafter called BSW's), there has previously been little systematic effort to acquire the necessary data. The primary reason for this lack is that until recently little thought was given to "professionalizing" the worker who did not possess a master's degree in social work. Furthermore, "professional" education has always been considered exclusively to be graduate education. Although the BSW has been used extensively in virtually all social work settings, his employment has mostly been thought of as an expeditious, if not satisfactory, way of dealing with the MSW manpower shortage.

The BSW was not considered to be a professional—that is, a person who can function independently, assuming responsibility for his own work and having the ability to make sound judgments—or even a "finished product" in his own right. Instead, he worked under "professional supervision" and was covertly pressured to "complete his education" by going to a graduate school of social work. Often if the BSW did not leave social service altogether, he would return to school and obtain an MSW.

The BSW's undergraduate major rarely prepared him for work in a social agency, even when his bachelor's degree was in social welfare. The undergraduate social welfare program in most colleges was organized around vague goals and was generally taught by members of disciplines other than social work. It included a curriculum that was geared to giving the student a preprofessional liberal arts foundation rather than to preparing him directly for social service delivery. When the BSW entered a social agency, his limited preparation necessitated extensive in-service

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training. He had to be assigned to activities that were rather menial, technical, and always under professional scrutiny and bureaucratic control.

This has proved to be an intolerable waste of overtaxed agency resources, manpower, and intellectual talent. Much of this waste could have been avoided if it had been possible to entrust greater responsibilities to the BSW. The burden on the MSW in supervising him would have been lightened, in-service training programs could have been reduced, and the agency goals could have been achieved better with more effective and efficient use of the BSW. But this could be so only if the BSW were properly prepared. The catch is that no one knew what "properly prepared" really meant.

Finally, a great deal of thought is being given to the proper academic preparation of the baccalaureate social worker.[2] But thought does not equal facts. When one does think about it, it becomes quite evident that there is an abundant lack of systematically acquired data on what the BSW needs to know in order to do his job well. Unfortunately, such knowledge will take a long time to acquire. Needed is thorough study of the actual activities of social workers and of what behaviors are required to perform these activities, a systematic delineation of the activities best suited to workers with different kinds and levels of training, an analysis of the kind of education that should and does occur at all levels of the social work training program, and an analysis of the training that seems to prepare workers best for all varieties of social service activity.

Such an inquiry would probably require a longitudinal survey in which for several years students would be unobtrusively followed through their undergraduate education and the first years of social work practice. This, plus a survey of the activities of many different types of social workers in different social agency settings, sounds like an effort that would take years and vast material and manpower resources to accomplish.

The urgency of the need to solve social problems, ease the social work manpower shortage, eliminate the waste of resources, and provide more relevance in undergraduate education are all so great that we cannot wait for the completion of such studies before taking action. Already the role of the BSW is, of necessity, changing dramatically. Steps in changing undergraduate education are occurring in response. In the next few years the BSW will be thought of, utilized, and trained quite differently from what is now the case. The following five predictions or projections detail what some of these changes might look like.[3]

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[2] The recent action of the National Association of Social Workers in admitting baccalaureate social workers who have graduated from recognized social welfare programs into full membership and the subsequent strengthening of standards for these programs by the Council on Social Work Education has spotlighted the need to identify more specifically the curriculum content related to practice needs.

[3] The projections are those of the authors of this chapter and do not necessarily reflect the opinions of other members of the curriculum-building project.

PROFESSIONAL ROLE OF THE BSW

1. *The BSW will have a professional role in the delivery of social services.*

No occupation can be considered a profession when its members lack ultimate responsibility for their own work. If the ultimate responsibility for the delivery of social services remains in the exclusive hands of the worker who possesses an MSW, then there can be no *professional* role for the baccalaureate holder. The BSW can only be an ancillary person, a helper, a technician. The role of such a person must necessarily be limited to carrying out orders from others and his competence is based not on his own judgment but on how well he carries out those orders. Until recently this role was the only one recognized by the profession for the baccalaureate-level worker.

But utilization of BSW's as full professionals with responsibility for their own accomplishments and judgment seems inevitable. The reasons are clear. In the first place, the shortage of MSW workers is so great that there is no reasonable expectation that all services can someday be provided by them. The rapidly growing need for social services, the inability of graduate schools of social work to expand rapidly enough to meet this demand, the mounting social problems calling for newer and larger programs, and the tendency of MSW's to shun many kinds of social service jobs and avoid many geographic areas all play a part in this probable outcome. Furthermore, it has repeatedly been shown that the quality of service is not diminished when BSW's perform activities once thought of as being in the exclusive realm of the MSW.[4] In fact, many studies show that the quality of service increases and the range of services expands when BSW's are fully utilized. When they are expected to perform professional jobs, more often than not they live up to or surpass the expectations made of them. It seems likely, therefore, that professionalization of the BSW, if it is not already here, will soon come to pass. The admission of qualified baccalaureate holders into full membership in NASW was seen by many as the profession's recognition and sanction of the achievement of beginning professional status on the part of those individuals.

The BSW will be considered capable of independent judgment just as are other professionals with bachelor's degrees such as teachers, occupational therapists, nurses, optometrists, engineers, and accountants. The fear expressed by some graduate social workers that this will diminish the importance of the advanced degree is unfounded. Advanced degrees would continue to be held in esteem and their holders would be given even greater responsibility, just as is now the case in most other fields. But by the same token, the person whose formal education terminates with the bachelor's degree would not be considered irresponsible or inadequate because he "did not complete" his education. The baccalaureate holder will be considered a *professional* practitioner.

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[4] Robert L. Barker and Thomas L. Briggs, *Differential Use of Social Work Manpower* (New York: National Association of Social Workers, 1968).

PROPER TRAINING OF THE BSW

2. *The BSW will be trained for his professional role through education that is (1) undergraduate, (2) extensive, (3) formal, and (4) academic.*

If the BSW is to have autonomous and professional responsibility, it is necessary that he be properly trained to assume that responsibility. By definition the bulk of his training would occur during his enrollment in an undergraduate program. His education must be extensive, since that is the only way to assure that he possesses the body of information and the refinement of skills necessary to do a worthy and independent job. With so much knowledge available and transmittable, no less than 4 years of undergraduate training is appropriate. As is the case with most undergraduates, the first 2 years of the social major's training would probably be broad and general, while the next 2 would be specialized and specific. During the junior and senior years his curriculum might approximate what the MSW student currently receives at the graduate level, because the BSW would be the primary agent of direct social service delivery.

It is also projected here that such training would be formal in the sense that it would take place in established educational institutions. In such institutions standards would be set for acceptance of students and for acceptable performance by them. These standards would be developed and maintained because the undergraduate programs would now provide education for responsible entry into professional practice. Such an eventuality would supplant the current reliance on agency in-service training programs and the process of socialization in developing baccalaureate-level practitioners.

In-service training has proved in most agencies to be a haphazard procedure. The employees who ostensibly depend on it for the bulk of their knowledge about the values and theory underlying their activity come from such a variety of backgrounds that such training must be redundant for some and over the heads of others. Furthermore, agency training programs are the first thing to be dropped when budget cutbacks occur. When they do exist, they are often poorly planned and implemented. Often the agency must rely on the even less satisfactory procedure of socialization—the exposure of workers to those who have more experience, with the expectation that the skills and methods of the latter will "rub off" on the former.

This is, of course, tremendously important and valuable of itself, but sole or primary reliance on it is intolerable. In-service training and socialization will always be necessary and are to be encouraged, but they will eventually assume their proper role—that of preparing the worker for the unique particulars of the agency's needs and requirements. Formal academic training is the only reliable way of assuring that the BSW has a minimal level of professional competence and that his competence is not just attuned to the specific needs of a given social agency.

RELEVANCE OF THE CURRICULUM

3. *The undergraduate social work curriculum will be relevant to the needs of the profession and of social work organizations.*

The content of undergraduate social work education must obviously

be geared to providing the student with the requisite knowledge and skills if he is to be an autonomous professional. To function professionally he must first have an underlying theoretical orientation and then a body of practical skills that have been shown to be effective and that can be accomplished by the worker. As Greenwood points out:

> The skills that characterize a profession flow from and are supported by a fund of knowledge that has been organized into an internally consistent system, called a "body of theory." A profession's underlying body of theory is a system of abstract propositions that describe in general terms the classes of phenomena comprising the profession's focus of interest. Theory serves as a base in terms of which the professional rationalizes his operations in concrete situations. Acquisition of the professional skill requires a prior or simultaneous mastery of the theory underlying that skill. Preparation for a profession involves considerable preoccupation with systematic theory, a feature virtually absent in the training of the nonprofessional. Because understanding of theory is so important to professional skill, preparation for a profession must be an intellectual as well as a practical experience.[5]

Clearly, then, the curriculum will not simply be a type of vocational school experience, nor will it be exclusively an academic experience. Instilling in the student this body of theory, including social work philosophy, will prepare him to function as a professional. But the curriculum must also provide the student with many of the basic skills he will be required to exhibit in his professional work experience. His education must train him to fulfill relevant functions that are being accomplished in social work organizations. His education will only be relevant if he is equipped to deliver social services in those ways that have been shown to be efficacious. Educational institutions must become more cognizant of the specific skills social work organizations use in the provision of their services. The BSW should be able to practice these currently utilized skills when he begins his professional employment. With a basic body of theory at the heart of his activity, he will be prepared in advance to acquire new skills and to meet needs as they appear. Thus he will not be statically bound to a set of skills that become obsolete owing to the emergence of new social needs and the discovery of more effective and efficient interventive methods.

STANDARDS OF COMPETENCE

4. *The BSW will have minimal standards of competence because of his professional education.*

A major reason for the delay in giving sanction to the use of BSW's as professional social workers is a lack of certainty about their competence. Even when many BSW's were found to be highly skilled, there was no assurance that all other BSW's would even approximate these levels of skill. Such concern was appropriate and even inevitable, inasmuch as the people who held these positions came from so many different backgrounds, had so many different orientations and values, possessed so many different motivations, and had such a variety of educational experiences. One could only be relatively sure about MSW's because at

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[5] Ernest K. Greenwood, "Attributes of a Profession," *Social Work*, Vol. 2, No. 3 (July 1957), p. 44–55.

least there was an assurance that all had been exposed to a uniform body of theory, had demonstrated a certain repertoire of skills, and had been integrated into the professional culture.

However, with the emergence of the baccalaureate social worker as a professional there would no longer be reason for such concern. A mimimal standard of competence would be expected at that level. The person educated in a professional academic program at the baccalaureate level will, upon graduation, be capable of "responsible entry" into professional practice. To graduate, each student would have demonstrated that he possessed a certain amount of knowledge and could perform a certain degree of skills. Academic programs will explicate in advance the behaviors for which they are educating. These behaviors would be consistent with the requirements of the profession and the needs of the field. Through a process of evaluation within the educational institution, the graduate would be certified as having a beginning professional expertise. Based on this certification the profession would be assured that an individual has achieved agreed-upon minimal standards of competence.

ENHANCEMENT OF THE MSW'S ROLE

5. *The role of the MSW will not diminish but will be greatly enhanced with the professionalization of the BSW.*

There is a hidden—and sometimes explicit—fear among MSW social workers that their realm will be encroached on by non-MSW's. This fear is usually rationalized by saying that training at the master's degree level is the only way to assure professionalism. The fear is that there will be no job or purpose for the MSW if the BSW is equipped to do an independent job in which he is given professional responsibilities.

The argument is a weak one. If the undergraduate curriculum prepares one to enter the social work profession, graduate training could be devoted to a greater extent to refining the skills acquired at the undergraduate level, increasing the worker's knowledge, focusing on further specialization within the total social work realm, and enhancing the graduate's ability to be a leader in his profession. The fear that if there is an undergraduate social work program there will be nothing for the graduate program to teach is foolish. Graduate programs can be devoted to "career" interests of professionals, for example, developing greater competence in a given social problem area (poverty, aging, corrections, mental health), as well as possibly developing management skills (team leader, consultant, staff developer, and so on) or preparing for greater competence as a psychotherapist. All of these options could be open and various graduate programs could become "specialized," depending on faculty and other resources.

This, of course, is the way most other professions are now functioning, and with great success. Their postgraduates have not been excluded from jobs and have never needed to feel threatened by baccalaureate-level personnel. MSWs would not be replaced in the new approach, but would rather be better social workers. They would be freed from many jobs that do not require their advanced training, and could thereby work at full capacity. This could not help but make the

MSW's job not only more productive for the client served, but more fulfilling for himself.

CONCLUSIONS

These five projections suggest dramatic changes in the future character of social work education. Present trends indicate the near certainty that these or similar changes will occur.[6] What is uncertain is how much factual data will be acquired and considered in developing undergraduate social work programs in the way the projections suggest. If they are based on little data, and thus much armchair speculation, the cure may be worse than the disease. The more data there are and the more that is taken into consideration, the greater will be the likelihood that needed changes will result in needed improvements in the undergraduate social work education program.

But what should be known? When one considers all the facts that ideally should be known in order to organize such a program rationally, one quickly realizes that much relevant data will be unavailable for some time to come. However, material is available, based on research and empirical inquiry, that may constitute a starting point.

This material is to be found in a series of independent researches and studies undertaken over the past few years. All of these endeavors were concerned with social work manpower utilization in various settings and were focused specifically on the baccalaureate-level practitioner. None of them was conducted explicitly to answer questions about academic education for baccalaureate-level social workers. Rather, they attempted to determine how better to achieve social agency goals through organizational and personnel innovations.

However, when the reports were concluded and reported, it became obvious that there was a wealth of data that could be useful in building a more rational basis for undergraduate social work education. All were especially useful in explicating the social work goals and showing the connection between these goals and the training necessary to fulfill them. They worked toward answering, among other things, the question "Education for what?" They thus provide some initial direction for the educator in his quest for a relevant education program for the undergraduate social work student. Their importance lies in revealing what is happening in actual social work settings, what the goals are, and what workers with all levels of training are actually doing under scientifically controlled conditions.

The reports that describe these studies are readily available through the sponsoring organizations or their authors. These reports are, for the most part, extensive, with detailed research efforts containing much information that is not relevant to the present interest. To extract what might be relevant would be a formidable task for the educator, who is concerned with other problems in addition to the ones noted here. It has therefore seemed appropriate to draw relevant material from these research reports and the work they represent and collect it in a form that would be more useful and less forbidding to the educator.

[6] Arnulf M. Pins, "Changes in Social Work Education and Their Implications for Practice," *Social Work*, Vol. 16, No. 2 (April 1971), pp. 5–15.

The subsequent chapters of this book are summaries of the relevant data from each of these studies. Collectively they represent all of the major manpower studies conducted or completed since 1965. The authors of these chapters have either led or been actively involved in the specific research inquiries. They were asked to review all of the data that resulted from their studies, including both published and unpublished material, and note those data pertaining to worker activity and baccalaureate personnel.

It was recognized in advance that obtaining data of this nature was not the goal of these researchers when they undertook their studies, and that the material reported for the present effort constituted post hoc findings and was not derived from inherent aspects of the study itself. In other words, the material gleaned from these studies, although primarily based on scientifically derived and empirically validated findings, was not itself empirically validated. Rather, the subsequent chapters are seen more as a public opinion survey of a small sample of respondents, but respondents who have had a valuable view of the activities of BSW's. The data that they report are not to be taken as irrefutable fact, or scientific evidence, but opinions that are derived as a by-product of the acquisition of such evidence. The empirical data will have to await the mounting of massive studies that should have a high priority on the profession's agenda.

Following these discussions, a summary and interpretation of all the papers is presented. An epilogue is also included here which shows that these findings have been and are being considered by those interested in undergraduate social work education.

Part Two

THE MIDWAY PROJECT ON ORGANIZATION AND USE OF PUBLIC ASSISTANCE PERSONNEL

Claire M. Anderson and Thomas Carlsen [1]

The Midway Project on Organization and Use of Public Assistance Personnel was conceived at a time when the shortage of social work manpower was viewed as the most difficult problem in the administration and development of public welfare services. Public assistance—the setting of the research—was deemed to be of the highest priority for study, inasmuch as that sector of the public social service delivery system was experiencing a critical manpower shortage.

Potentially salient factors in the mediation of the gap between variables of manpower supply and demand were considered to be the retention, use, and organization of scarce social welfare manpower. It was therefore determined that the most appropriate research focus would be on the organization of work at the point of service delivery, that is, on the job responsibilities of the direct service worker and his immediate supervisor.

EXPERIMENTAL DESIGN

The field experiment was designed to compare the operations of workers organized experimentally on a team basis with those of workers organized on the standard, conventional basis. Conventionally, in large urban public assistance agencies cases are assigned to workers who are responsible for providing direct services to clients while the supervisor functions as a hierarchical superior who reviews the worker's decisions and directs his own efforts primarily to case situations presenting prob-

[1] Claire M. Anderson, Ph. D., is Assistant Professor, Jane Addams Graduate School of Social Work, University of Illinois, Chicago. Thomas Carlsen, Ph. D., is Assistant Professor, Syracuse University School of Social Work, Syracuse, N.Y. This project was supported by grants from various units of the U.S. Department of Health, Education, and Welfare to the University of Chicago School of Social Service Administration. It was designed and directed by Edward E. Schwartz and was under the immediate supervision of William C. Sample. The field experiment was conducted in the Midway Research and Training District Office of the Cook County Department of Public Aid, Chicago, Ill., from February 1, 1963, to March 31, 1965. A detailed description of the experimental design and analyses of initial findings according to objectives and experimental variables of the Midway Project are presented in Edward E. Schwartz and William C. Sample, "First Findings from Midway," *Social Service Review*, Vol. 41, No. 2 (June 1967), pp. 113–151.

lems. The team organization, in contrast, was established with the aim of pushing specialization of staff functions to its limits. The experimental input consisted chiefly of restructuring the duties and responsibilities of the supervisor and the worker with the aim of giving the supervising social worker those responsibilities that would make the best use of his education and training and utilize his skills and knowledge at their highest level.

The objectives of the Midway Project were to determine the efficiency and effectiveness of specific organizational and administrative arrangements that were posited to have optimal impact for favorable outcomes in or benefits to clients. Underlying and implicit assumptions were that the manpower shortage in public assistance would continue and that the legislative mandate to coordinate financial and social services would prevail. Thus, assuming certain practical and political givens, an underlying question posed was: What might be done within the existing social realities and organizational structures to optimize and maximize the available staff resources in the interests of service delivery? The major independent variable investigated under varying caseload size was realignment of staff organization and use.

Three major criterion measures were constructed for the study of outcomes of the experiment: (1) morale of the workers and supervisors, (2) productivity of the workers and supervisors, and (3) client change measured in terms of improvement and deterioration. It was hypothesized that the team approach would effect more favorable outcomes on each of the foregoing measures than would the conventional (control) work group approach. The major proposition concerning relationships among the hypotheses was that superior staff morale would be positively correlated with superior staff performance and superior staff performance would be positively correlated with more favorable client outcomes. Thus worker attitudes and performance were viewed as intervening or proximate outcomes, and the major project objective was to determine whether clients' ways of coping with or handling a problem, as shown by their actions, had changed in ways related to the experimental design.

The client-change conception used was based on purposive problem-solving actions within specific delimited areas of functioning. Positive change or improvement within this frame of reference includes increases in purposive problem-solving activities or change from random or unfocused efforts to more organized ones. This conception thus takes into account efforts to achieve change as well as final outcomes. Hence it makes use of the concept of limited treatment goals. It was assumed, for example, that one treatment goal within public assistance would be to move a client from a state of apathy to purposive activity directed at problem-solving. The emphasis was on action rather than verbalization. Client change was rated by research staff social work analysts in 12 major areas: housing, employment, household and financial management, physical care, health problems and practices, dental problems

and practices, use of social agencies, use of recreational agencies, marital relationships and adjustment.[2]

For the purpose of the curriculum-building project only selected aspects of the Midway research are considered. This discussion focuses on worker behaviors without regard for the effects of Midway experimental inputs. Following Tyler's assertion that an "obvious source of educational objectives is analysis of . . . actual work . . . ," this paper considers the implications for undergraduate education of selected findings regarding staff performance, communications, and supervisory practices.[3]

The findings selected for presentation focus on the public assistance worker who, in the case of the Midway Project, was a college graduate from an undifferentiated undergraduate base. While the Midway Project was not conceived originally as an opportunity to test ideas about undergraduate social work curriculum, it does seem reasonable that selected information gleaned retrospectively about the work-life of baccalaureate personnel may be helpful in such an endeavor. Tyler's assertion may be helpful in building academic program and will most certainly be valuable in testing the fruits of labor.

SELECTED PROJECT FINDINGS

Productivity

The dual and related concepts of work unit and service unit were used in the worker productivity measures of the project.[4] The work unit describes activities of the public assistance field staff that involved direct contacts with clients, their families, and related others within the client system. These units included field visits made and attempted, scheduled and nonscheduled office interviews, and telephone interviews, regardless of whether these were initiated by the worker, the client, or related others. The work unit, then, describes staff effort or work performed in the delivery of services to individual clients and their families.

In distinction but related to worker activities, the concept of the service unit, or episode of service, refers to a task performed on behalf of the client. The service unit calls for the worker's conceptualization or identification of a partialized problem to be worked on within a relatively limited time period (such as 1 day to 1 month).[5] The unit has a definable beginning and end, a delimited central problem focus, and a discernible outcome. In terms of the research methodology, the service unit provides for relating discrete work activities, such as home visits, office interviews, or telephone calls, directly to relevant units of

[2] Edward E. Schwartz and William C. Sample, "First Findings from Midway," *Social Service Review*, Vol. 41, No. 2 (June 1967), pp. 113–151; William C. Sample, "A Study of Client Change in Public Welfare," unpublished Ph. D. dissertation, University of Chicago, 1968.

[3] *Building the Social Work Curriculum* (New York: Council on Social Work Education, 1961), p. 2.

[4] These findings are taken from Edward E. Schwartz and William C. Sample, "Organization and Utilization of Public Assistance Personnel," report to the Social and Rehabilitation Service, U.S. Department of Health, Education, and Welfare, 1970.

[5] *See* Helen Harris Perlman, *Social Casework, A Problem-Solving Process* (Chicago: University of Chicago Press, 1957).

service delivery as they may arise and be responded to during the course of a client's contact with the agency. An analysis of work performed by incumbents of fifty staff positions during the project field experiment provided detailed information regarding type, purpose, and distributions of productivity.[6]

Direct interview activity comprised 21 percent of reportable or actual working time according to time-study data.[7] By purpose, as defined by the worker in advance of actual contact, 45 percent of interview activities were distributed to financial services and 55 percent to welfare or nonfinancial services. Sixty-two percent of all interview activity was conducted in the field, 25 percent by telephone, and the remaining 13 percent consisted of district office transactions. Seventy-five percent of activities directed to financial services and 52 percent of welfare services were sought in the field rather than by telephone or in the district office. Overall, approximately 70 percent of all interviews were held directly with grantees and the remainder were distributed among other family members and a wide range of collaterals. The distribution of interview activity by grant category was as follows: Aid to Families with Dependent Children, including AFDC—Unemployed Parents, 65.2 percent; general assistance, 13.6 percent; Aid to the Blind and Aid to the Permanently and Totally Disabled, 12.5 percent; and Old Age Assistance, 8.7 percent.

An examination of the relationship of interview activities to service units or episodes of service revealed that on the average the service unit was comprised of slightly less than two activities. Specifically, one-activity units totalled 59 percent, two-activity episodes accounted for 21 percent, and the remaining 20 percent of service units required three or more activities.

A measure of the time interval encompassed by service units, defined as elapsed time between the dates of the first and last interviews devoted to an identified service, revealed that slightly more than 60 percent were completed within 1 day, and three-quarters were completed within 1 week. Less than 2 percent of the service units extended over a time period of more than 8 weeks.

Welfare services, other than crisis-related services or other official requirements, focused in particular on matters concerned with medical and physical health, child welfare, and housing problems. Such problem areas accounted for more than 80 percent of episodes of nonfinancial service as identified by the worker assigned to deal with the situation. Medical and housing problems comprised more than 60 percent of client circumstances deemed by the worker to constitute a "crisis."

Morale data were examined for evidence of relationships between attitudes about work and colleagues and performance measured quantita-

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[6] Activities and service units were reported by staff during a 19-month period from September 1, 1963, through March 31, 1965. The data presented include client-directed interviews by supervisory staff; supervisory activity constituted 6 percent of all interviews reported.

[7] As an example of the effect of supervisory activity on total data, it is noted that the estimated proportion of reportable work time would be increased to 23 percent if supervisory activities were excluded.

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tively. High satisfaction with supervisory human relations factors and with work associates were found to be the only attitudinal factors significantly correlated with high performance. Contrary to expectations, high performance was not associated with high job role satisfaction, identification with the employing agency, or satisfaction with the agency's work efficiency.[8]

A detailed analysis of the characteristics of workers who were high producers revealed a profile of a worker who had minimal agency experience and was young, Caucasian, unmarried, and male. Interestingly, those who had a high degree of performance also tended to be those who were not oriented to a career in public assistance or in the broader field of social welfare.

Communication

Three classes of communication were identified and studied by systematic observation of and interviews with 50 workers during a 6-month period in the second year of the field demonstration.[9] These classes, in descending order of their closeness to formal administrative behavior, were administrative communication, consultation, and discussion. They are differentiated conceptually along the following major dimensions: (1) the extent to which the formal organization determines where the communication originates, that is, the degree of choice a worker has as to whether, when, about what, and with whom he originates the communication, (2) the problem-solving nature and function of the interchange, and (3) the scope of lateral organizational responsibility to which the communication relates—that is, the work group, two or more workers, or a single staff member.

Administrative communication is predominantly determined by formal organizational factors such as assignment of workers to a specific work group involving shared responsibilities with other group members for such matters as routines, tasks, and cases. The concept essentially refers to communication in the interest of the work flow in day-to-day operations, or "housekeeping" functions. Workers are expected to circulate information regarding administrative directives, relay pertinent messages, report on case activities carried out in the absence of the regular worker, expedite transfers of cases, and work collaboratively with others as assigned.

In contrast, consultation and discussion are entirely optional. The worker decides whether, when, about what, and with whom he communicates. Use of consultation is determined by a worker's need and desire for help from a colleague with decisionmaking and problem-solving with regard to a specific task or circumscribed aspect of a case

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[8] *See* Thomas Carlsen, "A Study of Correlates of High Performance of Public Assistance Workers," unpublished Ph. D. dissertation, University of Chicago, 1969; James M. Gripton, "A Study of the Relationship of Job Attitudes and Work Organization of Public Assistance Workers," unpublished Ph. D. dissertation, University of Toronto, 1967.

[9] Claire M. Anderson, "A Study of Work-Related Communication Among Welfare Workers in a District Office of A Public Welfare Agency," unpublished Ph. D. dissertation, University of Chicago, 1966.

for which he bears the main organizational responsibility. The work-related aspect of consultation derives solely from the worker's decision to seek help from a colleague in delivering services.

Discussion is defined as work-oriented communication that relates to matters ranging from immediate occurrences on the job to any aspect of the worker's involvement within the social welfare field or the public assistance program. Workers may engage in "shop talk" about interesting daily work activities or mutual social welfare concerns of a broader perspective, ventilate about organizational stresses, or consider generalized and common problems in which their immediate participation is not required. Discussion is determined by a worker's desire to exchange ideas and opinions with colleagues and to express feelings about a wide spectrum of work-oriented interests and concerns. The work-related aspect of discussion derives from the employment of the worker within the organization and within the social welfare field.

The major proposition examined was that frequency of origination of communication with colleagues is determined by a worker's need for help with problem-solving and by specified formal and informal organizational factors. The findings with respect to occupational and social characteristics of workers indicated that those who initiated each type of work-related communication most frequently were the less experienced unmarried males in contrast to the more experienced married female workers. Younger workers and those who had not taken any graduate social work courses initiated administrative communication and consultation more often than did others.

The relatively higher rates of origination by workers comparatively new to the social welfare field are congruent with the theory that when a worker's integrative tasks exceed his integrative abilities, anxieties over problem-solving are engendered.[10] Turning to colleagues for help in the performance of day-to-day work as well as in adjustment to the overall setting may yield pragmatic solutions to discrete work problems as well as sustaining social support. The workers who have the greatest need for help with immediate decisionmaking as well as with broader work orientation appear to be willing to exert the effort and to bear the social costs involved in initiating help-oriented communication with peers.[11] When a worker asks another for assistance, he places himself in the position of reciprocating at a later day or according recognition and respect to the other in the event that his help is not sought in turn. In either instance the initiator bears a social cost for the support he seeks.

With regard to social characteristics of comparatively high originators, possibly single workers are more peer oriented than are married persons, and hence seek the satisfactions of a combined work and social reference within the job context. Men may originate work-related communications of both technical and nonpragmatic natures with colleagues more often than do women as a function of the traditional work orientation of

[10] Charlotte Towle, *The Learner in Education for the Professions* (Chicago: University of Chicago Press, 1954), pp. 213–228.

[11] *See* Peter Blau and W. Richard Scott, *Formal Organizations* (San Francisco: Chandler, 1962), pp. 134–139; George C. Homans, *Social Behavior: Its Elementary Forms* (New York: Harcourt, Brace & World, 1961), pp. 51–82.

males, accompanied by extensive needs to achieve job competence and status. Young workers may experience both objective and subjective needs for help with discrete work tasks more strongly than do their seniors in light of their relative inexperience in any field.

Findings with respect to informal organizational factors indicated that workers who perceived that their supervisors held favorable attitudes toward their problem-solving interchanges with their peers tended to originate consultation more often than did those who perceived their supervisors as holding negative attitudes. However, members of work groups within which there was a general consensus that the supervisor was positively inclined toward discussion tended to originate more of this kind of interaction than work groups perceiving a negative attitude. Field staff appear to bring their informal behavior into congruence with their view of the supervisor's attitude toward consultation, whereas workers seem to adjust their rates of discussion according to the majority view of the supervisor's opinion. Inasmuch as consultation relates to the completion of tasks for which the worker is personally responsible, his own interpretation of the supervisor's attitude seems to be linked with his behavior. On the other hand, insofar as discussion refers to overall work adjustment and is by nature more informal and social than consultation, the worker's sensitivity to the prevailing group climate takes precedence over his personal perceptions.

Other pervasive group influences were shown with respect to discussion —that is, members of highly cohesive groups were found to initiate discussion more often than members of work groups characterized by fewer friendship bonds. Just as the work group climate with regard to perception of the supervisor's attitude toward discussion was found to be associated with high levels of initiation, similarly associated is the prevalence of a friendly atmosphere among colleagues. Apparently the more optional and informally social the class of work-related communication, the more salient is the "group" to the worker's initiation of interchanges with his peers that refer broadly to the work milieu. In contrast, origination of technically and pragmatically work-oriented communication appears to be related more to the individual's needs than to his work group atmosphere.

Supervisory Practices

Selected findings from a survey of supervisory staff members are included in this report since they add a different perspective of the job conditions and performance of undifferentiated baccalaureate-level workers. The findings presented relate primarily to supervisors' views of their workers' use of supervision and to their views of staff development priorities.

All supervisors held spontaneous unplanned conferences initiated both by workers and by themselves. The majority of the MSW supervisors also held additional regularly scheduled conferences that they deemed functional to case-planning on an ongoing nonemergency basis. In general the supervisors emphasized the worker's experience as a prime determinant of the operational dimensions of the supervisor-worker relationship. While most workers specifically call for and require supervisory help in

decisionmaking, the more experienced tend to exercise greater initiative in decisionmaking.

Most supervisors characterized their day-to-day operating aims in supervision of workers as assuring the provision of financial and other social services to which the client is entitled, within the policies and procedures of the agency, in ways that make maximal use of the worker's time and effort. Minimal references were made to teaching and training workers, with a focus on their ongoing professional development within this work setting, much less within the broader social welfare system. Although the work-day priority is placed on meeting specific and immediate service delivery needs, ideally supervisors would like to pace teaching-learning experiences to worker readiness, to place greater emphasis on teaching and training in skill and knowledge development, and, indeed, to upgrade the supervisory process.

Queries as to the desirable duration of supervision yielded the view that it depends on the worker, his experience, competence, initiative, r otivation, and attitudes. A minority of the supervisors believed that workers would always need supervision to the ends of objectivity in client contacts and with regard to administrative and policy matters.

All supervisors emphatically expressed interest in expanded staff development opportunities for direct service workers and some for supervisors as well. For example, all staff members were thought to benefit from further education in principles of social casework and social welfare service delivery.

It is of further interest to differentiate supervisors' responses according to their level of education. Supervisors with professional social work degrees spoke of staff development needs in terms strikingly similar to those used in setting out the objectives of graduate training curricula. For example, MSW supervisors—but not their non-MSW supervisory colleagues—suggested that all staff be indoctrinated to principles of human growth and behavior and that supervisory personnel be exposed to training in management principles and techniques. Non-MSW supervisors conceived staff development efforts as more related to "delivery" than to "understanding" outcomes.

Supervisors generally expressed a preference, work context permitting, for devoting their major efforts to study, diagnosis, and planning of services along with direct service to and treatment of clients. Lower priority was expressed for training the casework field staff and for case review and administrative control. For the majority of the supervisors, immediate service to clients therefore took precedence over training of workers and administrative directives.

DISCUSSION

The definition of worker behavior or output in public assistance is highly complex, owing primarily to the difficulties inherent in client problems and goal classifications. Output specification further implies concern for quality of performance, a manageable consideration when goals involve income maintenance but an extremely problematic issue given the plethora of nonfinancial goals implicit in public assistance work.

For the purpose of the undergraduate curriculum-building endeavor, the Midway findings provide some specific insights about how and under what conditions the baccalaureate-level worker performs a role in public assistance. For example, the findings appear to be in opposition to the notion that working through bureaucratic procedures is a major obstacle to client service. If one assumes that providing financial services requires more negotiation within the public assistance system than does the provision of welfare services, the data bring this often-held assumption into question. What is in the nature of welfare services vis-à-vis the covert and overt needs of the client and the use of resources within the community or social welfare system, or within the worker's area of expertise, that accounts for the greater number of contacts required over a longer period of time to provide welfare services? Preliminary consideration of this question suggests that in addition to diagnostic acumen and planning ability the worker must comprehend and be able to apply knowledge of interacting social and service delivery systems, that is, client with agency, agency with agency, agency with community, and so on. An essential component of this understanding and skill is the worker's ability to transmit such knowledge for use by the client.

Assuming for the purposes of discussion that provision of financial and other social services in public assistance will in the future be administratively separated and fulfilled by different types or levels of staff, the work measurement data hold various implications. Delivery of welfare services and of financial services involved different activities, and these differences are noted along several dimensions. A greater proportion of financial services were accomplished in the field than were welfare services. Higher proportions of welfare services than of financial services were delivered by telephone contacts and office interviews. Welfare services required more activities and more time. It was additionally noted that a number of service units initiated with a financial service focus shifted to nonfinancial concerns.

Thus staff training and development plans cannot be founded on a neat distinction between financial and welfare role assignments. All staff will require familiarity with income maintenance policies and procedures both as they affect resource delivery and as they influence worker-client relationships. All staff will require sufficient knowledge about and sensitivity to survival needs to allow them to make adequate referral and other dispositions appropriate to client needs that shift from one sphere to another unpredictably. Foremost, regardless of formal assignment, staff members must be trained to respond readily to implicit service requests or at least to enable clients to state their concerns and be helped in negotiations within the social welfare complex. Stated still another way, the findings make apparent a need for the worker to have a grounding in crisis theory and intervention and basic principles of administration and organizational theory, as well as in the use of community resources and advocacy.

Another commonly held assumption brought into question by the findings pertains to the proportion of interview activities that occur in the field rather than by telephone or within the agency. Undergraduate training that perpetuates the propensity to focus on formal

worker-client transactions in the organizational setting clearly would be contradictory to real requirements.

The finding that high producers in the public assistance system tended to be individuals without an orientation to social welfare careers is a curious phenomenon, the implications of which for curriculum may become apparent only through comparative study of individual baccalaureate social welfare majors versus undifferentiated baccalaureate staff. The explanation offered for the Midway data is that the young worker lacking clearcut goals is less subject to the output norms of his older, more experienced colleagues and has fewer restraints to behaving as a "rate-buster." Should he continue in this type of employment, the social pressures of the group would be brought to bear and his activity might decrease. As long as the young worker refrains from considering social welfare as a long-term career goal, he may be able to resist group pressures and maintain his own personal efficiency and output standards. This explanation easily accounts for high attrition rates attributed to young workers, who, perceiving that one cost of being acculturated would be to abandon their personal standards, choose to leave.[12] It can be anticipated with a high degree of certainty that the undergraduate social work major will be exposed to such pressures in the typical public assistance setting and that his educational experience must include knowledge about means of dealing with such diverse pressures exerted by colleagues.

In the area of informal work-related communications among field staff, knowledge of workers who express their needs for help with pragmatic decisionmaking and problem-solving, as well as with the broader orientation to the work milieu through interchanges with colleagues, is pertinent to social welfare administrators, social work educators, and direct service practitioners. The nature and frequency of spontaneous interactions among peers that indicate learning needs, work concerns, and interests may point to ways of meeting these needs further through formal arrangements. Observations by administrators and educators of high or increasing work-related communication among staff or students may be used as indicators of the need for expanded or innovative methods for helping staff to carry out their job assignments or students to carry out their learning tasks. Since field instruction and learning, with the dual use of faculty and agency field instructors, has been a traditional model within social work education, it seems pertinent to consider parallel implications for the administrator and the educator.

Social work educators might consider extending the prevalent practice within some settings of assigning students at different stages of educational development to the same agency for fieldwork placement. The beginning student might gain an advantage by identification with his educational senior, while the latter might consolidate his professional knowledge and socialization through interchanges with those less advanced.

If the administrator or educator considers consultation to be functional, he might determine from study of patterns of initiation of work-

[12] Lawrence Podell, "Attrition of First-Line Social Service Staff," *Welfare in Review*, Vol. 5, No. 1 (January 1967).

related communication which workers or students are ready to assume more responsibility than is expected of them in the current role yet is less than that required at the next level. An interim helping role might be assigned to such workers or students according to their demonstrated abilities and interests. Formal designation of consultative roles of peers might conserve the educator-supervisor's time for more demanding and complex areas, provide a training step toward certain supervisory or educative positions, and furnish formal rewards to the workers or students through the status granted and the opportunity to exercise special skills. It might further be expected that organization of workers or students into work teams would be accompanied by frequent mutual helping efforts.

The study of work-related communication among colleagues suggests the further possibility that if direct service practitioners, whether paid staff or students, understand their motivation for initiating and participating in cooperative lateral communication, they may be better able to recognize their needs for learning and their abilities to contribute to others. Perhaps they may be enabled thereby to make full use of both formal and informal problem-solving resources. In any event, the Midway findings, by identifying the intricacies of various communication systems within the work setting, mandate that social work curricula highlight knowledge and skills that will enable the practitioner to interact with an increasingly diverse complex of colleagues and clients.

The examination of supervisory style and preferences yielded one major finding that has broad implications for undergraduate training—that staff development commands a low priority in supervisory practice. Given this observation, at issue is the assumption that undergraduate preparation will be buttressed substantially in practice by staff development through supervision and in-service training. The Midway experience suggests that reliance on such supports may be unrealistic in a public assistance setting and that the student's opportunity to build on his education as intended may be severely limited in the everyday work situation. Thus greater demands are placed on undergraduate curricula, and it may not be possible to sustain undergraduate endeavors without ambitious continuing education opportunities.

CONCLUSION

Selected findings of the Midway Project may contribute to undergraduate social work curriculum-building by describing real-life role performance by undifferentiated baccalaureate workers in a public assistance setting, and by so doing provide an opportunity for conjecture about real role expectations and requirements.

A major conclusion to be drawn from the selected research findings described here is that the role of the public assistance worker is more heavily laden with varied interpersonal relationships than may commonly be assumed. Contrary to the view that the job of field staff is predominantly that of "pushing paper," the worker is engaged to a significant degree in relationships with a broad and highly complex system of individuals representing client, collegial, and service delivery subsystems. The relationships are informal as often as formal, and ad

hoc or unpredictable as often as appointed. Role requirements and expectations obviously are far more complicated than is reflected by formal statements of job description or career ladder design.

In addition to specific substantive areas of curriculum content identified in the presentation and discussion of findings, the authors wish to identify briefly several overriding concerns derived from research and other professional experience:

First, undergraduate social work education cannot be formulated identically along lines and models familiar to those who have been exposed to graduate professional education in times prior to the emergence of quality undergraduate professional social work education programs. In addition to unencumbered thinking about undergraduate curriculum needs, we must reformulate post-baccalaureate educational objectives. For example, the need to prepare graduate practitioners to utilize and complement baccalaureate personnel is being demonstrated repeatedly, but master's curricula are slow to reflect this.

Second, the concept of the team approach to service delivery—that is, a team including staff with varying levels of education—holds promise. Curriculum-building efforts should assume viability for experimental purposes pending the accumulation of additional tested knowledge.

Third, curriculum must at all costs avoid a static quality. That a baccalaureate program can provide a certain level of expertise and transfer a certain minimum amount of knowledge about specialization is a tenable goal as long as curricula at all points along the professional educational continuum account for rapid shifts in practice requirements.

Finally, a hallmark of the professional is to exercise judgment and creativity, and educational preparation of the social worker must make provisions for developing this capacity. The need for such preparation is mandated by such realities as the low priority given this role in professional learning and growth by Midway supervisors and the demand on the worker for flexibility in responding to shifts in client needs and in organizational circumstances. Field practice is hobbled by the paradoxical situation in which the supervisor of the baccalaureate worker views continued staff development as a priority but is constrained from devoting major attention to such activity as part of his role. In the absence of other resources or opportunities the baccalaureate worker's potential capacity for professional creativity may be stifled to the point of driving him to occupation in another field.

Part Three

THE CATHOLIC SOCIAL SERVICES OF WAYNE COUNTY STUDY ON STAFF UTILIZATION IN THE FOSTER FAMILY CARE DIVISION

Thomas P. Melican [1]

The long-range objective of the demonstration-research project on which this report is based was the improvement of service to children in foster family care and to their families. The more proximate objective was to make the most efficient use of available personnel in pursuit of the long-range objective. The assumption was that the service job could be partialized into tasks and clusters of tasks that could be handled differentially by personnel with varying levels of formal education. The proposition to be tested was the extent to which a service unit composed of graduate and baccalaureate social workers (MSW's and BSW's respectively) in a team approach would compare with a service unit of MSW's and a service unit of BSW's working on a case assignment basis.[2]

SETTING AND DESIGN

Catholic Social Services of Wayne County is a private sectarian family and children's agency whose purpose is to provide "casework service that contributes toward a unified, stable and healthy family life." [3] This purpose is translated into programs that include "family service, marriage counseling, adoption service, assistance to unmarried mothers, care of children outside their own homes and protective services." [4] A time and cost analysis of the agency's operation was conducted during the course of the project in accordance with procedures

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[1] This project reported here was supported by a grant from the National Institute of Mental Health. Thomas P. Melican, DSW, is Associate Professor, Wayne State University School of Social Work, Detroit, Mich. This study was conducted from 1963 to 1968 under the direction of Dr. Melican.

[2] John J. Carey, Paul J. Hickey, and Thomas P. Melican, "Meeting the Manpower Crises in Child Welfare." Paper presented at the National Conference on Social Welfare, May 31, 1966. (Mimeographed.)

[3] Tri-County Social Resources Directory, United Community Services of Metropolitan Detroit, Detroit, Mich., 1966, p. 13.

[4] Ibid.

Table 1. Allocation of Staff Time by Activity Center

Activity center	Professional	Clerical	Total
Family	40.6	24.6	35.9
Child care	39.5	23.8	34.9
Education	4.3	1.7	3.5
Special program	2.7	.3	2.0
Other	3.5	.7	2.7
General administration	9.4	48.9	21.0
Total	100.0	100.0	100.0

developed by Family Service Association of America.[5] The staff was assigned to five major groupings according to position classifications: administrative, supervisory, MSW, BSW, and clerical. The analysis used a classification system based on two basic considerations, *purpose* and *type of activity*. Consideration of why the activity was performed (purpose) found expression in the creation of activity centers that reflect the various service and educational programs as well as the facilitation of these programs. Allocation of staff activities was arranged to combine activity centers as shown in Table 1.[6]

A more detailed breakdown by staff groups is available for the various activity centers. The differential deployment of MSW's and BSW's in the various centers is in part a function of their assignment to these programs and in part a function of the research design within which the Foster Family Care Division operated. The pattern of this differentiation has historical roots such that family counseling activities in the family division were reserved more for MSW's, services to the unmarried mother were assigned to BSW's, and protective services were assigned to BSW's.

Consideration of type of activity found expression in the designation of 32 activity codes for professional staff members, ranging from in-person, in-office interviews to conferences and dictation. Supplementary codes described preparation for or travel to and from the specific activity. For the agency as a whole, it can be noted that each of the professional staff groups engaged in all of the listed activities, although the percentage of time spent in these activities differed. Thus the administrative group, as expected, spent much more of their time (63 percent) in administrative activities than the supervisory, MSW,

[5] *Time Analysis Manual, Procedures for Time Analysis in Family Service Agencies Including Those Which Provide Child Welfare Services*, prepared by John G. Hill, Ralph Ormsby, and William B. McCurdy (New York: Family Service Association of America, 1962).

[6] Eighteen activity centers were used in the time study. For purposes of this presentation, the centers were combined in accordance with the agency's table of organization. "Family" includes family counseling, services to unmarried mothers, family life education, and group counseling. "Child care" includes adoption, foster family care, and institutional placement services. "Education" includes social work and pastoral counseling training. "Special programs" include the Cuban and interfaith programs. Research, community activities, and volunteer programs were combined under "Other." "General administration" included enabling activities not directly chargeable to specific activity centers.

or BSW groups (17, 6, and 4 percent respectively). The line workers spent much more of their time in in-person contact with clients and collaterals (MSW's 46 percent, BSW's 44 percent) than the supervisory or administrative groups (23 and 3 percent respectively). Comparisons between the MSW group and the BSW group for the agency as a whole reveal gross similarities in the way these workers spent their time. Some of the variations noted are differences in in-person contact with clients (MSW's 37 percent, BSW's 29 percent), with collaterals (MSW's 8 percent, BSW's 16 percent), in administrative activities (as noted above), and in travel (MSW's 6 percent, BSW's 9 percent).

The demonstration-research project involved the Foster Family Care Division of the agency. In accord with the research design, the division was restructured into three service units that differed in their personnel composition and in their mode of operation. Each of the units was headed by a trained and experienced graduate social worker and had a unit secretary assigned to it. In the experimental unit, a mix of MSW's and BSW's attempted a team approach to service delivery. Of the other two units, one was composed of MSW's and one of BSW's, with case assignments being made to individual workers. In the course of the project, responsibility for intake beyond the point of initial application and responsibility for home-finding were assigned directly to the service units. New cases were assigned to these units on a rotating basis, with the family rather than the individual child serving as the basis for case differentiation.

By design, the distribution of cases among the units coupled with the distribution of staff in these units created a situation in which the behaviors of the MSW's and BSW's in the control units were apt to be similar, at least as measured by the categories in the time analysis procedures. Thus Brieland's notation that the tasks assigned to nonprofessionals and professionals tend to be identical was built into the service system deliberately for purposes of comparison in the execution of these tasks.[7] The experimental unit had options in task assignments not available to the control units, especially since the implementation of the team approach lent itself to differential use of MSW's and BSW's. It was anticipated that in exercising this option, a difference in task assignment to the MSW's and BSW's might emerge that could serve as an index for relating differences between levels of formal training and task assignments. The possibility of supervisory intervention at the direct service level was introduced as a safeguard of service standards and the extent of such intervention was another basis of comparison among the units.

FINDINGS

The extent to which the workers in these units (Unit A, MSW's; Unit B, experimental; Unit C, BSW's) differed in the kinds of activities

[7] Donald Brieland, "The Efficient Use of Child Welfare Personnel," *Children*, Vol. 12, No. 3 (May–June 1965), p. 92.

Table 2. Percentage of Time Spent in Different Activities, by Unit

Activity	Unit A	Unit B	Unit C
In-person interviews	33.2	42.0	37.4
Client	11.9	15.5	7.3
Collateral	21.2	27.4	30.0
Self-involved	30.0	18.4	21.8
Other-involved	12.2	19.5	13.0
Administrative	3.6	2.8	2.6
Travel	18.8	14.6	21.8
Miscellaneous	1.9	1.5	3.3
	100.0	100.0	100.0

in which they were engaged is shown in Table 2.[8] The range in proportion of time spent in in-person contacts (Unit A 33.2 percent, Unit C 37.4 percent, Unit B 42.0 percent) is in inverse ratio to the range of time spent in self-involved activities (Unit A 30 percent, Unit C 21.8 percent, Unit B 18.4 percent). Unit B workers spent considerably more time in other-involved activities than the other unit workers, at the expense of less time spent in self-involved activities.

The percentage distribution of time spent by workers in Unit B by level of training is shown in Table 3. On these gross measures there is less variation between Unit B workers than is noted in the comparison of all three units. The MSW's spent a smaller proportion of their time with collaterals than the BSW's and a higher proportion in self-involved activities. This pattern is also true of the MSW's in Unit A vis-à-vis the BSW's in Unit C.

While differences were observed between MSW's and BSW's in the extent to which they engaged in different kinds of activities, the more noticeable finding is the extent to which, at the direct service level, the type of activity alone does not distinguish the functioning of these two groups. In suggesting another approach to the question, Gordon noted that previous attempts "to define professional practice by characteristics of the action alone (activities) has been singularly unfruitful."[9]

In the course of the project an additional element was observed with the experimental unit that lends further support to this conclusion and has implications for the team approach. In the team conferences a division of labor was attempted at the direct service level, whereby some preference was given to assigning the MSW the general task of ascertaining with the child's family the extent to which they might be

[8] The twenty-four activity codes were collapsed for purposes of this presentation into seven major headings. Self-involved activities included preparation and follow-up, recording, letters, memos and reports, and planning. Other-involved activities included supervisory conferences, case consultation, staff conferences, lectures, case assignment routines, and general recruitment of foster parents. Administrative activities were those that were perceived as necessary to the production of the end-product services but were not service activities themselves. Community activities included time spent on the local, state, regional, or national levels in social planning, social action, and other community planning activities. Travel was defined as time spent going to and coming from the central activity.

[9] William E. Gordon, "A Critique of the Working Definition," *Social Work*, Vol. 7, No. 4 (October 1962), p. 11.

Table 3. Percentage of Time Spent in Different Activities, Unit B, by Type of Worker

Activity	MSW	BSW
In-person interviews	39.2	45.1
Client	15.9	15.2
Collateral	23.3	29.8
Self-involved	22.0	16.3
Other-involved	19.6	19.4
Administrative	4.9	1.7
Travel	12.2	15.9
Miscellaneous	1.8	1.3
	100.0	100.0

involved in planning for his future. Some preference was given to assigning to the BSW the general task of placing the child and continuing contact with him and with the foster parents. Such an arrangement would have made for differential use of staff at the activity level at least in regard to the people with whom the workers were in contact. The findings of the time study and a later review of caseloads revealed that division of labor on this basis was not realized for the team as a whole. In response to this reality, an initial preoccupation with "differential task assignment" was altered to a consideration of a "cluster-of-tasks" assignment.

In attempting to program for a cluster-of-tasks assignment as one basis for differential use of personnel, it was noted that throughout the course of the project the staff of the experimental unit had to exert considerable conscious control in order to describe the job to be done in task clusters that might be assigned differentially. Even when this effort was successful, factors other than amount of educational preparation were considered in making assignments. Thus the extent of a given worker's involvement at any one point was a major determinant of who would continue to work with a particular child, parent, or foster parent. Other factors that influenced assignments seemingly irrespective of level of training were the sex of the worker, his relative availability with respect to total work load, and his expressed interest in exploring or continuing with specific situations. These factors contributed to a situation, throughout the course of the project, wherein at the direct service level workers in the experimental unit referred to their "cases," albeit with some uneasiness since they noted that they were expected to think of themselves as a team with task or cluster-of-task assignments.

While differences in this respect were observed at different times, these differences could be attributed more to individual variations in supervisors, MSWs, and BSWs. Differences did not emerge at the direct service level that could form the basis for different job descriptions for MSW's and BSW's based on either the activities themselves or on the level of knowledge and skill judged to be required to achieve the service goals.

In this project, at least, this lack of differentiation may in part be a function of the facts that the MSW's had recently completed their

professional training at the time they were assigned to the experimental unit and the BSW's had been exposed to experiences and responsibilities over time that tended to minimize any initial differences that may have existed between them and the professionally trained workers. In addition, the research staff (including the case analyst) concentrated on assessment, decisionmaking, planning, and outcome in their monitoring of the service units. One of the limitations of this project is the fact that, for a number of reasons, no systematic attempt was made to obtain data on possible variations in technique at the level of the face-to-face interview. It is possible that differences exist at this level. If such is the case, the import of these differences was not readily discernible in case assessment, decisionmaking, and planning.

The contributions of the supervisors of all three units to the overview assessment, decisionmaking, and planning were perceived as an important factor in the lack of gross differences among the units in these respects. In addition, the contribution to all of the units made by the casework director and the influence over time of feedback from the case analysts were perceived as factors that tended toward creating uniformity. It was thus concluded that the question of differentiation of the input of MSW's and BSW's at the direct service level cannot be viewed in isolation from inputs by supervisors and the casework director. A focus on the service system as a whole suggests that the combination of direction, supervision, and direct service is a factor in the extent to which all the units arrived at case assessments, decisions, and plans that were perceived by the analyst as compatible with the social work perspective, and that consideration of the totality of these factors is a question even more basic than the question of differentiating between the contributions of the graduate worker vis-à-vis the baccalaureate in-service-trained worker.

When the foster family care division as a whole is considered, one similarity emerges between the MSW and BSW positions. Workers in these positions are in great part transitory as far as a professional career is concerned. For the recently graduated MSW, the position was a step toward either a supervisory position or a position in another field of practice that would have been the worker's first choice if he were the sole determiner of that choice. For the BSW recently graduated from college, the position could be described for women as intermediate between completion of college and the responsibilities of marriage and family, for both men and women as intermediate between completion of college and enrollment in graduate school, or for both as interim employment before entering a field other than social work. The exception that made for more stability involves the married woman or widow who seeks employment at a time when her family situation permits or necessitates her entry or reentry into employment. Opinions on the ramifications of these observations as they have implications for the continuum of social work education will be noted next.

REACTION TO PROJECTIONS

The projections and predictions that were cited in the introduction to this volume can be approached from several points of view The

extent to which, as conclusions, they are compatible with the experience gained in the several manpower projects can be noted. Thus they can be viewed as implications for practice or action and as such can be evaluated in the light of their consistency with available findings. It is in this light that responses to the general formulations reflect the experience of one project with all its limitations of generalizability. Concordance with other projects and with other experiences provides one basis for action in the directions indicated.

The extent to which, as evidence, the findings of the several projects demand action in the direction indicated is much more tentative. As was pointed out in the introduction to this volume, longitudinal studies of various patterns of service delivery will take time and resources. The urgency of the manpower situation may not permit this luxury, and the efficacy of new approaches cannot be demonstrated unless we are prepared to embark on them. If nothing else, we can suggest that the burden of proof has to be shared by traditional approaches as well as by innovative approaches. In an atmosphere of experimentation and evaluation, the task may well be one of proceeding with developments in the undergraduate curriculum so that any potential in these approaches has an opportunity to be realized. We can only emphasize the contributions that college-trained workers with a relatively undifferentiated undergraduate preparation made when they had an opportunity for fuller involvement at the direct service level than had heretofore been sanctioned. The efficacy of an undergraduate curriculum that has the objective of producing a professional worker can best be assessed when such programs are fielded and the performance of their graduates evaluated.

In the absence of strong evidence to the contrary, the projections, if implemented, may have aspects of self-fulfillment. The policy decisions they require and the implementation of these decisions can be viewed in the context of "a time for decision." [10] In this context, a general reaction to the five projections made in the introduction is highly positive.

This positive reaction to the projections is based on a willingness for the social work profession to accept responsibility for services that are oriented toward the goal of enhancing the realization of human potential and that are concerned with the extent to which patterns of social functioning contribute to this. The social work perspective has been viewed as encompassing a breadth of goal and pervasive interest in man in his environment that has resisted closure on becoming either an applied psychology or an applied sociology.[11] Gordon has suggested that "social functioning, seen in the transaction-with-environment emphasis would be opened up as a far richer field for intervention,

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[10] Robert L. Barker and Thomas L. Briggs, *Differential Use of Social Work Manpower* (New York: National Association of Social Workers, 1968), pp. 264–270.

[11] Thomas P. Melican, "Toward a Frame of Reference for Evaluating the Effectiveness of a Foster Family Care Service," p. 44. Unpublished DSW dissertation, George Warren Brown School of Social Work, Washington University, St. Louis, Mo., 1969.

on the one hand, and its importance as a field of intervention greatly enhanced on the other." [12]

One implication of the heritage of what is becoming articulated as the social work perspective, for the writer at least, lies in a willingness to maintain social work's diffuse commitments by broadening its manpower base. The alternative of limiting social work's interest to fit its resources is viewed as the kind of selectivity that leads to an evolutionary dead end. The concern is that if persons who staff existing social services fail to find a home in the social work profession, they and the services that depend on them will drift beyond the pale of social work. The proposal to develop an undergraduate social work program that will produce social workers at the baccalaureate level who have a professional role in the delivery of social services is therefore welcomed. The challenge is to design a curriculum that will make this possible.

Another compelling reason that inclines the writer to a positive reaction to the projections as a whole is based on evidence that when BSW's have the opportunity to test the degree of their involvement, they have moved beyond restrictive job descriptions that place them in an assistant status to perform in a way that is more compatible with a job description that emphasizes associate status. They may even go beyond that to perform on a professional level.

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[12] William E. Gordon, "Toward a Social Work Frame of Reference," *Journal of Education for Social Work*, Vol. 1, No. 2 (Fall 1965), p. 24.

Part Four

THE NATIONAL ASSOCIATION OF SOCIAL WORKERS' UTILIZATION OF SOCIAL WORK PERSONNEL PROJECT

Thomas L. Briggs and Michael Herrera [1]

The major objectives of the National Association of Social Workers' Utilization of Social Work Personnel Project were (1) to determine the number of social work staff members in state mental hospitals, their levels of education, and the uses to which they are put, and (2) to identify new and efficient staff utilization patterns that would minimize the deleterious impact of manpower scarcities on the quality of mental health services. Specifically, the project sought to provide practical answers to the following questions:

1. What is the proportion of professionally trained social workers (MSW's) with respect to the total number of staff members in the social service units of state hospitals?
2. What attitudes do social service unit chiefs have about how their personnel are utilized, and what is the relationship between this attitude and actual staff use?
3. What are the roles of the social work personnel in state mental hospitals as perceived by the chiefs who deploy them, and to what degree are these roles fulfilled?
4. To what degree are there differences between the amount of supervision, consultation, and in-service training that is given to the MSW workers on the staff compared to the non-MSW workers?
5. How may non-MSW's be utilized in State mental hospital social service units so that they are helpful in resolving the shortages of MSW workers while at the same time increasing the quality and quantity of social work services?

The answers to these questions, as obtained through surveys of the literature and questionnaires returned by 75 percent of all State hos-

[1] This project was sponsored by a grant from the NIMH. The project staff included Thomas L. Briggs, project director, Robert L. Barker, senior research associate, Tessie Berkman and Lili Sweat, consultants. Others participating in the study were the senior social work staff at Connecticut Valley State Hospital, Middletown, Conn. Thomas L. Briggs, MSW, is Associate Professor, Syracuse University School of Social Work, Syracuse, N.Y. Michael Herrera, MSW, was a team leader at Connecticut Valley State Hospital at the time of this study and is now Assistant Professor, Syracuse University School of Social Work.

pitals in the United States, are described in Robert L. Barker and Thomas L. Briggs, *Differential Use of Social Work Manpower.*[2] Six major conclusions are drawn from the survey:

1. MSW and non-MSW social workers are employed in approximately equal numbers in direct service positions in state mental hospitals. They are generally used interchangeably, with the result that optimum service quality for patients and other client groups is sometimes sacrificed.

2. Supervision, consultation, and in-service training were just as extensive, and in some cases more so, for MSW's as for non-MSW's.

3. Most social service chiefs believed that non-MSW's were only expedient to the MSW manpower shortage and had no unique contribution to make.

4. There was a tendency for chiefs who believed that non-MSW's had a unique function and purpose (one-third of the total) to utilize them in a wider range of functions than did chiefs who did not view non-MSW's as having unique purposes.

5. Those functions of the social service units that were considered to require less training and skill to fulfill were considered by the chiefs to be among the most important social work roles. However, the workers spent a disporportionate amount of their time in activities that tended to require more skill and training to accomplish and did so at the expense of the former activities.

6. The greatest obstacle to the differential use of social work staff is the attitude of the field that the use of non-MSW's is an expedient answer to a "temporary" shortage of MSW's.

In addition to data gathered in this survey, further data were available from the demonstration phase of the project, which took place at Connecticut Valley State Hospital, Middletown, Conn., and which was conducted in cooperation with the Connecticut State Department of Mental Health. Following an in-depth functional analysis of social work services within the hospital, the demonstration experiment focused on in-service training that would enable social work personnel to do the following:

1. Determine clearly the functions and goals of the social work service.

2. Determine all possible means of fulfilling these goals, rather than confining themselves to traditional approaches.

3. Determine what staff members are best equipped to provide the means that would result in goal fulfillment.

4. Determine which discrete functions must be done at the expense of which others in the event of manpower scarcities.

5. Work as members of a social work team comprised of both specialists and generalists, so that non-MSW's could be used more widely.

6. Assign activities on the basis of goals to be accomplished rather than basing assignments on cases or tasks.

7. Consider as the client for social work service not merely the

[2] New York: National Association of Social Workers, 1968.

patient in the hospital but also his family members, his personal associates, the patients in the hospital as a group, the community that is most vulnerable to mental illness, the staff of the hospital that uses social work services, and the public at large.

Major findings of the field demonstration were as follows:

1. Attitudes of Connecticut Valley State Hospital social service staff generally coincided with findings of the national survey. However, given in-service training, the social service staff were able to see the consequences of their attitudes and use of personnel.

2. The field demonstration at Connecticut Valley showed that non-MSW social workers can perform a variety of functions that were previously done by MSW staff members. Activities can be structured, service goals can be identified, needs can be predicted, and training and supervision can be organized so that non-MSW utilization on a differential basis in teams does not mean lowering of standards. The use of non-MSW's resulted in a qualitative as well as a quantitative improvement of service in that a wider range of needs were met and the department was better able to respond to the requests made of it.

3. Use of the non-MSW in direct service with patients and other client groups freed the MSW to engage in community mental health planning work. The role of the MSW also changed in regard to greater involvement in consultative, teaching, and management activities. The clinical skill of the MSW was used more selectively and his expertise was placed in a broader context as he offered consultation to other team members.

This paper will focus on the field demonstration of the conceptual model developed as a part of the NASW study. Specifically, it will focus on the role of the baccalaureate-level worker (BSW) as it evolved during the course of the project. And finally, education and training implications will be highlighted.

PROPOSED MODEL

After the initial phases of the NASW project, which included a massive survey of literature regarding all aspects of the manpower problem, a survey of 208 social service departments in mental hospitals, and an in-depth study of 20 representative hospitals, the findings suggested that the manpower dilemmas were related to inefficient use of personnel.[3] These conditions moved the researchers to pose and test alternative means of providing services that would result in greater manpower economy. A dynamic process model evolved that was based on the conceptualization of the BSW as a beginning professional.

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[3] For a report of these findings, see Robert L. Barker, Tessie D. Berkman, and Thomas L. Briggs, "Differences and Similarities in the Use of Professionally and Agency Trained Social Workers," Utilization of Social Work Personnel Project Number One, and Robert L. Barker and Thomas L. Briggs, "Trends in the Utilization of Social Work Personnel: An Evaluative Research of the Literature," Utilization of Social Work Personnel Project Report Number Two (New York: National Association of Social Workers, both 1966). (Mimeographed.)

Functional Analysis of Organization

Many previous models of staff utilization have attempted to segmentalize the respective jobs of MSW and BSW groups without first considering systematically the goals and functions of the agency. This premature segmentalization tends to foster a service delivery system based on a static conception of role performance ability without having sufficiently addressed itself to changing needs of clients or of the agency.

Determination of the agency's goals in a systematic analysis of the organization's function is the first in a series of steps in the NASW model. First, the stated goals of the organization were explicated. Second, these goals were identified as to the degree of their importance, in the event of a scarcity of resources that might result in the sacrifice of some goals. Third, the concealed or latent goals that were performed in order to enable the explicit organizational goals to be fulfilled were identified and evaluated. Fourth, the different possible means by which the organizational goals may be achieved were explored. And finally, consideration was given to how the jobs were to be done by differentially allocating activities to various personnel. After this process the organization is better able to begin to deal with the question of differential utilization of personnel.

Other Components of the Model

The specific theoretical construct utilized in the model related to the dimensions of how an organization might arrange its personnel to meet client needs, fulfill agency functions, and use personnel differentially. Basically the theoretical construct consists of alternatives to more traditional familiar constructs. Thus, rather than the traditional case or task assignment as the unit of differentiation, a cencept called "episode of service" was used. Instead of grouping personnel into different units, such as admissions or intake, personnel of all levels and kinds of training work together in differentiated activities as part of a social work team. And finally, rather than allocating activities on the basis of administrative decisions, theoretical distinctions are made. The theoretical orientations consist of two parts—the "typology of client needs" and the "level of intervention"—that attempt to classify the kinds of clients to be served and the level at which a member of the social work organization will intervene to meet the clients' respective needs. Each of these elements may be new and unfamiliar; they will be described further. Each of the concepts is interrelated and can be viewed as a system model for utilization.

Episode of Service

An alternative choice in an organization's decision about the unit of differentiation was the episode of service (EOS). The EOS is a cluster of activities that go together to achieve a social work organization's specific goal. It is identified by the goal, but includes the connotation of all the alternative means by which to achieve it.

The means chosen to achieve the service goals should be the most efficient of those that the workers are competent to perform. The EOS

is assigned to the social work team, whose leader allocates parts of the activity to different team members.

Social Work Team

The social work team typically consists of a group of social work staff members working together to achieve a given goal.[4] Rather than separating the BSW and MSW, the team approach groups them together in order to maximize their relationship and ability. On the team there is at least one MSW, who acts as team leader, and several BSW's. The number of team members depends on the nature of the agency and the goals to be achieved. As operationalized, the service goals are determined by the professional members of the team. Only the team leader coordinates all the activities. He must be expert in defining the needs of the client sectors, defining the service goals, and assigning activities to suitable team members to meet those goals.

In order for the team personnel to be used more efficiently, it is necessary for the organization to classify the client need system in an understandable and useful formulation. The model proposes a more comprehensive view of who the client of the organization is and would include anyone who uses the service of the social worker, whether directly or indirectly. When the range of the organization's clients is identified, their needs are more visible, and a beginning effort can be undertaken to differentiate the social service activities that will meet these needs.

Typology of Client Needs

In the typology of clientele, eight different groups were identified as being served by the hospital social service department: (1) the identified patient, (2) the patient's family, (3) the patient's personal associates, (4) the patient community, (5) the staff community, (6) the service community, (7) the vulnerable public, and (8) the lay public. These sectors of the client typology are alternatives to the older principle of differentiation, such as direct versus indirect activity. With a seeming expansion of identified needs, it allows for a more accurate examination of the range of activities the organization might provide. When the range of clientele is more clearly conceptualized, the objective of finding more efficient means of meeting needs through differential utilization of staff comes closer to being achieved.

Levels of Intervention

In the model, the questions still remained of who on the team should be selected to render a specific service. A criterion was needed for the differential allocation of activities among team members and between MSW's and BSWs. Several promising conceptions were reviewed. One

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[4] A complete monograph of this subject is Robert L. Barker and Thomas L. Briggs, *Using Teams to Deliver Social Services* (Syracuse: Syracuse University, 1969). A greater elaboration of the concepts can be found in Robert L. Barker and Thomas L. Briggs, *Differential Use of Social Work Manpower*, chaps. 3, 9, 10, 11, and 12.

attempt by Levine, called *Levels of Social Work Intervention,* seems to have much merit and was used in the present study.[5]

According to Levine, social work practice can be conceived of as intervention into the life processes of individuals, groups, and communities for the purpose of maintaining, enhancing, or restoring social functioning. The intervention is seen as occurring at four levels on an ascending order of complexity but descending order of primacy for survival. These levels are need-provision, problem-solving, conflict-resolution, and systems change. They may be conceived of as the full range of social work activities. In the demonstration project the concept of levels of intervention emerged as a valid criterion, a sort of conceptual handle by which to differentiate assignment of BSW's and MSW's.

The first two levels, need-provision and problem-solving, were activities that a BSW could be taught to perform with a reasonable amount of in-service training. The other levels appear to emerge as the province of the MSW.

THE FIELD DEMONSTRATION

Connecticut Valley State Hospital, Middletown, Conn., was chosen as the site for an in-depth inquiry into the social work roles and activities performed there and for a demonstration of methods of differential deployment of baccalaureate-level personnel. This hospital was chosen because it was representative of other state hospitals throughout the country and because of the wholehearted cooperation offered by the hospital staff and the Connecticut State Department of Mental Health and their willingness to act on innovative ideas that departed from tradition.

Connecticut Valley is one of six major units operated by the Connecticut State Department of Mental Health. The hospital has a long and enviable history and has offered innovative leadership to the State in the mental health field. Its average patient population is about 2,500. In 1965 the hospital decentralized its administrative and organizational structures into geographic units. The impetus for decentralization and geographic grouping came from the current push to break down the massive and impersonal hospital with its concomitant goal of moving toward a community mental health approach.

It was fortuitous that the NASW study began shortly after this change in the hospital structure, since the phases of the study enhanced the expansion of the social work role within the hospital. Prior to decentralization, the social service department was composed primarily of MSW's. Non-MSW personnel were hired on a time-limited basis to provide them with an opportunity for career testing. The predominant interest of the social service staff was intensive casework.

The proposed model and the theoretical concepts described earlier were applied to the social service department at Connecticut Valley. The field demonstration was conducted for a 1-year period beginning

[5] David L. Levine, *Levels of Social Work Intervention, Client System Involvement and Worker Equipment* (Syracuse: Syracuse University School of Social Work, 1968). (Mimeographed.)

April 1966 through April 1967. The five objectives of the demonstration phase were to (1) keep the concepts that were being developed related to the reality of current practice, (2) assist in establishing the usefulness of the concepts in easing the manpower shortage and in achieving greater service-needs balance, (3) provide an opportunity to modify and refine the concepts as they were assessed against experience, (4) act as a gauge of how understandable and communicable they were and of the ability of the staff to utilize them, and (5) identify and overcome institutional barriers that would inhibit their maximum use.

The project got under way just before a number of new BSW's were employed by the hospital, so the feasibility of the experimentation and demonstration was maximized. At the time of the project and during the course of the study, the BSW staff consisted of 17 workers. This was a substantial addition to the limited number previously employed.

In order to achieve the objective, the proposed model and theoretical concepts were presented in weekly staff meetings with the supervisory and administrative social work staff and in occasional meetings with the line workers. These meetings took the form of in-service training programs, but related primarily to the higher echelon of the social work staff because it was felt that they should modify and develop the concepts in their own ways and report the outcome in subsequent meetings.

Outcome criteria were established at the beginning of the demonstration. A simple utilization model was used to determine if the proposed model and concepts led to more efficient use of social work personnel. In this model better utilization of workers would be judged as achieved if any of three out of seven possible outcomes resulted. Changes in both quality and quantity of service provision were sought, but the possible outcomes of the use of the concepts could be as follows:

Possibilities	Quantity	Quality
1	+	+
2	+	same
3	same	+
4	+	−
5	−	+
6	same	same
7	−	−

Quantity of service would be considered achieved if the social work organization were able to provide services to client groups that had not formerly been served, without sacrificing the quality and quantity of work that had been done before. Increased quality would be considered achieved if the specified goals were reached or approached to a greater degree than before. Scientific measurement of the quantity and quality of service provision was not achieved in this study.

Judges were used in the assessment of the demonstration project and its outcome. The judges were those people who were in some way involved or connected with the project and included social service personnel on the hospital staff and officials from the State Department of Mental Health. Consideration was given to the array of other intervening variables that might have influenced the outcome. Attempts were made to minimize these by soliciting opinions about outcome from a wide variety of sources, but especially from those persons having least to gain by making judgment, whether positive or negative.

The analysis of the demonstration project was concerned with ways of maintaining and improving the level of service provision in the face of manpower shortages. The efforts of the demonstration program were focused on improvement of the quality and quantity of service provisions through the differential use of BSW personnel.

STEPS IN THE DEMONSTRATION

The demonstration program began with the employment of new BSW's at the hospital. Seventeen BSW's were employed during the formal period of the program. They were introduced to the manpower model and its concepts during the orientation period. Supervisory personnel had developed a formal orientation and in-service training program that included an organization of social work services based on the team model, utilizing the EOS concept for differential allocation of activities.

The BSW's were for the most part recent graduates from colleges in the area and were embarking on their first jobs. Most of them were in their early twenties, with the majority being female. In their undergraduate work they had concentrated primarily in the areas of sociology and psychology. Although only a few had previous social work experience, almost all had some experience in volunteer activities. Most of the BSW's viewed their employment as an opportunity for career testing.

During this initial period the BSW's were oriented to the hospital and to the nature of the social service program. During that same period they were assigned to the various social service teams for further orientation. In the interest of experimentation, each of the four possible hospital units used a different social service team composition and deployment pattern.

In Unit A there were three social work teams consisting of one MSW and no more than two BSW's. Each of the teams was assigned to one of the psychiatric teams located in the unit. This unit continued the pattern of assigning cases to individual staff members for the purpose of coverage and continuity of care. Nevertheless, service was not on a case basis in the traditional sense of one worker doing everything required by the patient assigned to him. When a need arose that could be dealt with better by another member of the team, the worker to whom the case was assigned saw to it that other colleagues became involved. Assignments of this type were seen as episodes of service.

In Unit B one social work team was developed that was comprised

of the entire social service staff in that unit, a total of six persons. As in Unit A, there were three psychiatric teams, so that one or two BSW's were assigned to each psychiatric team to carry out the activities that were generally considered the function of social service. These activities were generally specified in advance and were assumed to be those that the BSW could perform after receiving initial training.

Yet another deployment pattern was utilized in Unit C. The MSW leader had seven workers on his team, one an MSW worker with a specialty in group work and the other six BSW's who had developed various interests and skills through specialization. As in the other units, two BSW's were assigned to each of the psychiatric teams. They did not, however, restrict their activities to services only within the needs of the psychiatric team, but served all the social work services to which they were assigned in the unit.

In the fourth unit, which was for children, another deployment pattern emerged. Two social work teams were organized, one led by an MSW with casework training and the other by an MSW with group work training. The social service chief of the Children's Service Unit was acting unit administrator. One of the two teams was organized around specialties so that each of the team members had a unique area of responsibility geared to his special skill.

As can be seen from Figure 1, there were seven social service teams at Connecticut Valley State Hospital, each with a unique orientation, size, personnel composition, internal structure, and relationship to other disciplines. It has become apparent that numerous other variables probably could be considered relevant in the operation of the teams. Given all of their differences, however, the teams had common features. Each team had an MSW leader who validated the service goals and delegated responsibility for carrying them out to the most appropriate team member available. All the requests for service, including those made of the BSW's assigned specifically to psychiatric teams, were made through the team leader, and all results of each activity were relayed to the team leader. Finally, regardless of the size of the team, there was some opportunity for differential deployment of activities and thus an increase in the capacity of the participants to develop various specializations.

With the use of different deployment patterns within the four units, the concept of "level of intervention" was helpful in delineating the kinds of activities that were best performed by the BSW's. The new BSW's rapidly became skilled in the circumscribed and limited activities they were initially assigned. They progressed at their own pace and were able to take on more complex activities as they demonstrated their practice abilities.

In conjunction with this beginning development of generic social work skills, the BSW's also developed, largely through their own interests and training, special spheres of competence. These areas of specialization were usually related to the common needs of the clientele relevant to the team.

One team identified a major need of patients, families, associates, and the lay public as post-hospital living facilities. One BSW therefore

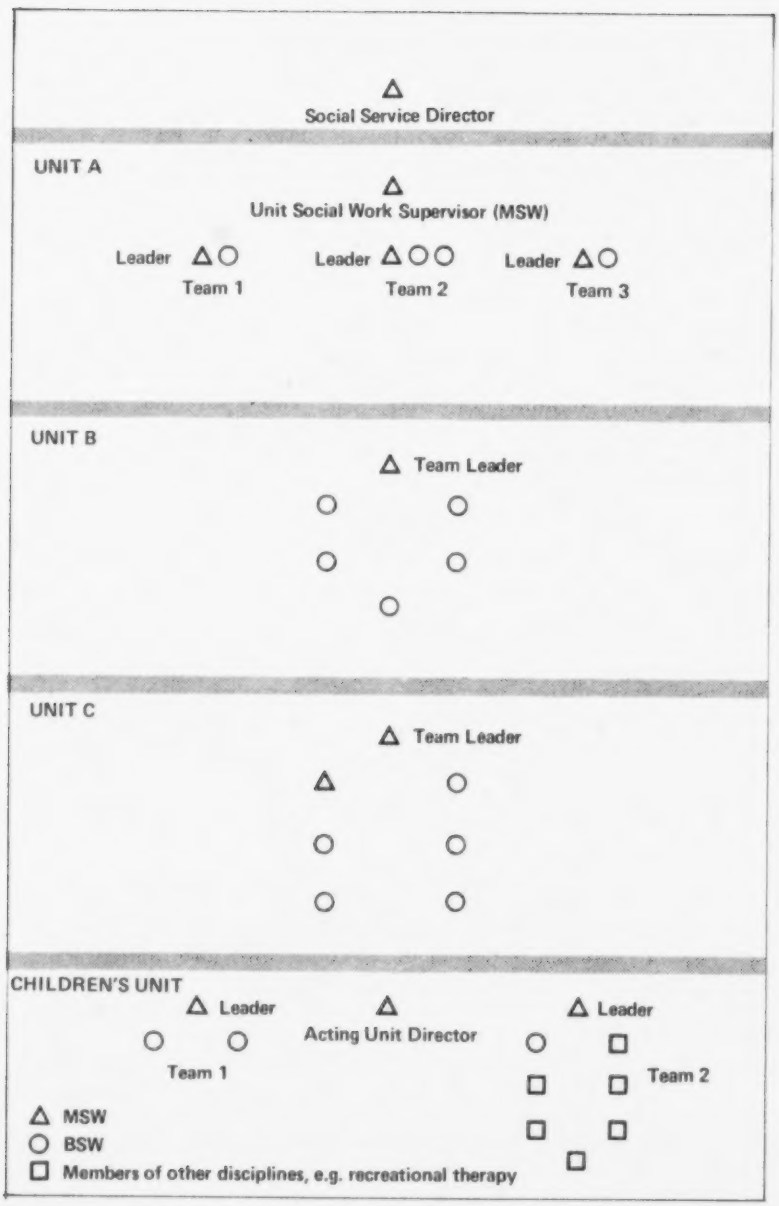

Figure 1. Staff Deployment at Connecticut Valley State Hospital

specialized in locating homes and farms that offered different kinds of living arrangements to ex-patients. Another BSW, who had nursing experience, became an expert in nursing home placement. The esteem accorded to BSW's with expertise in special areas encouraged others to develop similar focuses of interest and specialization. As the use of BSW's was seen to be valid and the concept of the social work team was more greatly accepted, the problem with respect to using BSW's then became a matter of assessing their talents and abilities and providing appropriate training and practice opportunities.

FINDINGS AND IMPLICATIONS

The goal of the project—to increase the quality and quantity of social service—appeared to have been reached. In the judgment of the persons involved in the program, the range of services was expanded, the skills with which these services were performed increased, and more needs of more people were fulfilled. The major sacrifice that took place during the program was a reduction in casework therapy by the MSW. This was related to the changing role of the MSW as he worked more closely with BSW's. The social work supervisory staff concluded at the end of the program that 80 to 90 percent of all social service provision could be accomplished at the first two levels of intervention—need-provision and problem-solving—and that BSW's could work well within those activities, given the professional controls and supports possible in team operation. The social work staff considerably expanded the range of services to include client groups that heretofore had received little attention. The BSW's provided service to a wide range of these client groups.

The initial activities of BSW's were focused on patients and their families and primarily at the level of need-provision. As the BSW's progressed in the acquisition of knowledge and in the development of skills, they became able to utilize interventive skills at the problem-solving level with these two client sectors. In conjunction with the development of these skills to a point at which the BSW's could work at a more complex level of intervention, they also expanded their activities to include work with different client groups at these two interventive levels.[6]

Use of BSW's in the program was both valuable in easing the shortage of professional social workers and in expanding the range of services that can effectively be provided. One of the obstacles to their use was the attitude of the MSW's, who, among other reasons, had difficulty in adequately conceptualizing a role for the BSW. The proposed model, however, provided structure and framework by which

[6] In October 1969 Connecticut Valley State Hospital was revisited to assess the pattern of staff deployment since the close of the demonstration program. Although the program ended in the spring of 1967, much of the conceptual orientation and the staff deployment patterns that had been developed still remained. Individual and group conferences were held with the administrative and supervisory personnel of the social service department and it was learned that BSW's were actively involved in providing services to all of the client groups at the first two levels of intervention. Further, through the use of in-service training and specialization, some BSW's were involved at more complex levels of intervention with certain client groups.

differential deployment and utilization could be undertaken. A related problem was to develop an education program and process that would enable the BSW to reach a level of performance at which he could provide necessary services. The efficiency of the proposed model ultimately depended on the ability of the personnel involved to take on new roles and the ability of the organization to provide an educational process to train social workers (both BSW's and MSW's) for these roles.

MANPOWER AND TRAINING NEEDS

During the course of the demonstration project the training needs of the baccalaureate-level person were of prime importance, since they were reflected in the worker's ability to perform social service activities. The educational program for BSW's conducted during the project consisted of three separate components that operated concurrently: formal orientation and in-service training, unit group activities, and individual supervision.

The formal orientation program, of 6 weeks' duration, was developed for the specific purpose of orienting BSW's to the hopsital and its physical plant, to the other disciplines working in the hospital, and to the social work profession. Orientation to the profession focused on the role of the social worker as a team member in a unit system; trainees were also exposed to the values and standards of the profession.

Following the orientation program, a 6-month in-service training program was instituted. The BSW's met weekly for training in two broad areas: (1) professionalism and (2) knowledge and skill. The learning experiences with respect to professionalism were geared to providing the BSW with guidelines for behavior and suggesting role models for interaction with client groups. Broadly speaking, the areas covered were professional social work roles, relationships, conduct, awareness, and self-discipline. In the knowledge and skill area, emphasis was placed on a problem-solving approach and specific content related to components of interventive activities. Some of the areas covered were interviewing, study process, family evaluation, and use of community resources. Knowledge input in the sessions also included information on human behavior and characteristics of mental illness.

In conjunction with the elements of the training, the BSW's were also exposed to training experiences on the units to which they were assigned. In these sessions their orientation to the operation and staffing arrangements were treated more specifically. On the unit, the training experiences related more directly to the BSW's work needs. The group sessions were skill oriented and attempted to maximize the BSW's ability to perform his activities. Since the training was geared to the provision of service to client groups, this tended to maximize the BSW's inquiry into the *how* of doing things rather than the *why*. There was also an atmosphere of urgency in terms of learning, because of its immediate application on the job. In the unit group activities, peer learning was used extensively and proved to be a positive factor in upgrading workers' skills.

All BSW's were also involved in weekly individual conferences with MSW team leaders. The nature of these conferences were twofold,

with different objectives: (1) case management conferences in which the focus was on explicating objectives, validating service goals, making assignments, and assessing outcomes, and (2) a traditional supervisory conference that leaned strongly toward the educational and training needs of the individual BSW.

As reported, multiple arrangements were used in training BSW-level personnel. The experience suggested that on the whole the BSW was more of a deductive learner, content with maximizing learning vis-a-vis his own experience.

It became apparent during and at the end of the project that the BSW as a professional practitioner undertook a number of different roles. Although initially the BSW's role was conceptualized in relation to the primary or traditional client, during the course of the project some BSW's became actively involved with all of the client systems.

TYPOLOGY OF CLIENT GROUPS

In addressing the question of the BSW's training needs, the researchers found it useful to construct a matrix composed of the levels of intervention, the typology of clientele, and worker behavior (see Figure 2). This training of the BSW can be viewed as preparing him to intervene at some level in the processes of individual groups and communities or of the different client sectors for the purpose of maintaining, enhancing, and/or restoring social functioning. This proposed conceptual matrix provides a heuristic classification for systematically examining the nature of the problem confronting the client(s), the kinds of activities called for in intervention, and the knowledge, skills, and attitude needed by the BSW. This three-dimensional model generates some ninety cells that represent units of instruction or education for social work personnel at all levels. The study results suggested that the chief domain of the BSW is levels one and two with all client groups.

A precise and detailed analytical deduction of all the parts or cells of the matrix has not yet been undertaken and requires further exploratory descriptive examination. The following is a descriptive, heuristic attempt to examine some of the components in levels one and two of this model as they relate to the BSW.[7]

Level 1—Meeting Basic Needs

Meeting basic needs implies the provision of services required by any of the clients either to maintain normal levels of social functioning, restore the system to previous levels of functioning, enhance the current level of functioning, or prevent system dysfunction.

Knowledge. The broad knowledge component at this vector requires of the worker an understanding of the normal functioning of individuals, groups, communities, and other client groups. Knowledge should

[7] For a more detailed discussion of this conceptualization *see* Thomas L. Briggs and Lester J. Glick, "Baccalaureate Education for the BA Level Practitioner in Social Welfare," *Proceedings of Upstate New York Undergraduate Conference for the Social Services* (Syracuse: Syracuse University School of Social Work, 1968). (Mimeographed.)

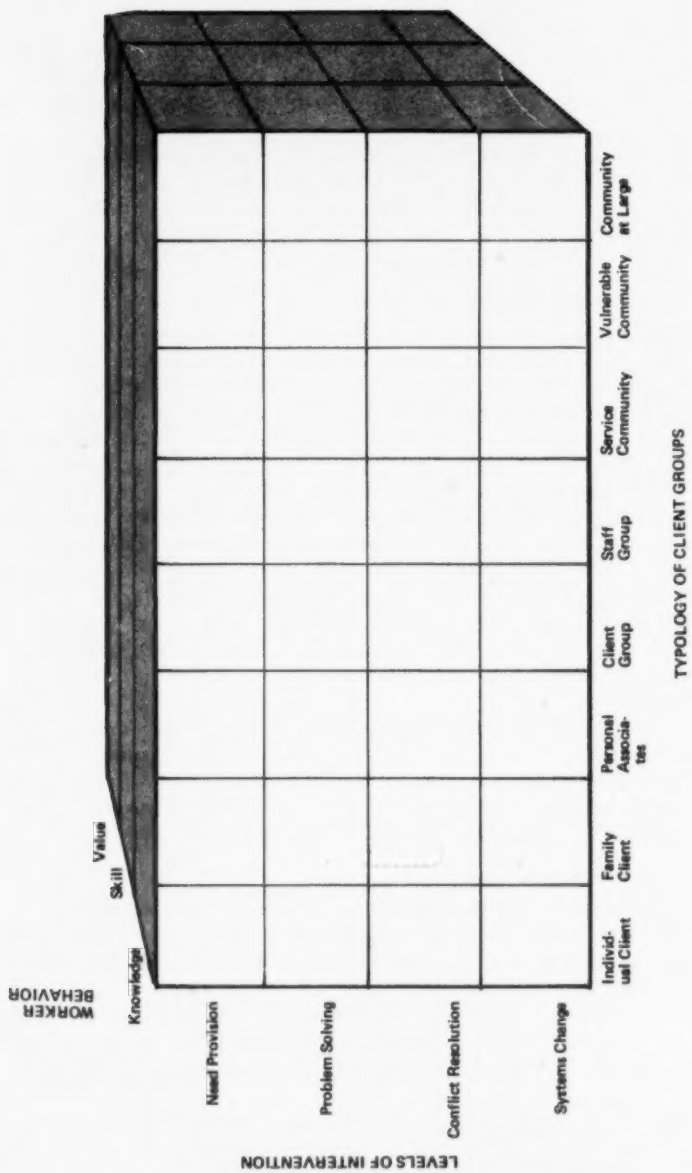
WORKER BEHAVIOR
Knowledge
Skill
Value
Need Provision
Problem Solving
Conflict Resolution
Systems Change
LEVELS OF INTERVENTION
Individ-ual Client
Family Client
Personal Associa-tes
Client Group
Staff Group
Service Community
Vulnerable Community
Community at Large
TYPOLOGY OF CLIENT GROUPS

Figure 2.

include understanding of the normal economic, political, and cultural systems and how they reflect on the client groups.

Values. The value (attitude) components necessary for performance at this level of intervention require an identification with those values broadly held by persons in the helping professions in a democratic society—especially by MSW social workers.

Skills. The skill component requires that the practitioner comprehends the normal functioning of all client systems and subsequently can identify those systems that are dysfunctional. He also needs to have skill in human relationships sufficient to enable him to be supportive in the efforts of the client group to meet their own needs.

Problem-Solving and Management

The second vector of the model refers to the process of evaluating and acting on blocks that interfere with goal achievement on the part of any client system. Some generalized types of problems frequently presented by client systems are as follows: unawareness of antecedent condition, lack of consideration of problem-solving methods based on the scientific method, lack of objectification of the problem, distortion of a problem that is societal rather than unique.

Knowledge. One important body of knowledge for problem-solving is the scientific method, which provides a method of problem identification, analysis, and hypothesis-testing. When applied to various client systems it permits an understanding of the concepts of prediction, cause, and consequence and establishes boundaries for normalcy for a given situation. Furthermore it provides a basis for understanding inductive and deductive processes and enhances the learner's potential to think and write succinctly and precisely.

Problem-solving is premised on communications skills and a knowledge of interviewing techniques. Problems of individuals, groups, and communities are frequently an extension of a larger social problem that affects sizable population segments. Therefore at this level of intervention the practitioner should have beginning knowledge of such social problems as poverty, discrimination, mental illness, and delinquency. He needs to have an understanding of theories of their cause and prevention in addition to an ability to hypothesize how they might be ameliorated.

Values. For performance on level 2 the practitioner need not only identify with such social work values as confidentiality and self-determination, but should use them spontaneously and consistently.

Skills. At this level the practitioner is in the process of consolidating his communication skills. His orientation to the sacientific method should permit him to participate in the analysis of problems and make certain predictions based on a priori conditions.

In presenting this model, it is obvious that there is no discrete line between the levels of intervention. The BSW therefore needs to have at least a cognitive understanding of the entire continuum of interventive activities. The findings of the study suggest that levels one and two with all client groups might be the chief service domain for the BSW.

CONCLUSION

The presented model can be viewed as a broad cross-sectional picture of the nature of social work practice. The conceptual framework constitutes a paradigm for using dimensions of clients, nature of problem, nature of social work activities, and the behavior of the worker. This model can become a guide to selection of education and training for baccalaureate-level personnel.

Part Five

THE U.S. VETERANS ADMINISTRATION STUDY ON THE USE OF SOCIAL WORK ASSOCIATES

Virginia Karl [1]

In the U.S. Veterans Administration the Department of Medicine and Surgery, within which social work service operates, has as its mission "to provide hospital, outpatient, nursing bed, restorative and domiciliary care"—or, briefly, health care—"to eligible veterans." A continuum of medical care ranging from outpatient clinic care, to hospital care, to extended care services, to follow-up on return to the community is provided to eligible veterans. Thus the VA can provide a complete integrated spectrum of inpatient and outpatient medical care.

There is a social work service in every one of the 176 VA medical care stations (hospitals, independent clinics, domiciliaries, and regional offices). Social work is a respected, essential member of the medical team within the hospital and clinic setting, planning and executing the care and treatment of the patient. Social work is actively involved in and contributes its services in all phases of the continuum of patient care. It is that discipline on the medical team with responsibility for the assessment, care, and treatment of the social factors in the medical care and treatment plan afforded the veteran.

The social worker makes social assessments, intervenes with social problems, provides supports and social treatment to the patient and his family, and serves as liaison with the family and community. During the complete spectrum of the veteran's medical care there is not a phase of his treatment in which the social worker is not involved: at the time of his request for admission to medical care, while he is undergoing treatment in the hospital or on an outpatient basis, planning for his release from the hospital or domiciliary to return to community living in the setting most appropriate to his needs, following him when he is released to community living. The VA medical care program recognizes that the veteran's social needs are interrelated with his illness and must be attended to if he is to benefit from the medical treatment.

[1] This project was conducted by the U.S. Veterans Administration from December 1962 to December 1965. Virginia Karl, MA, is Chief, Administrative Standards and Services Division, Social Work Service, Veterans Administration, Washington, D.C.

Over the years social work service has been committed to the pursuit of a high degree of professional develop[illegible] in order to provide the most effective services for its clientele. As one step to this end, in 1950 the VA established the MSW degree as the minimum requirement for employment as a social worker. In subsequent years, with the overall shortage of social work personnel and the demand for social service in the VA's expanding medical and social care programs, which derived partly from the increasing number of geriatric and chronically ill veterans, it was imperative that the VA explore other possibilities for increasing its social work manpower.

With the strong support and recommendation of the VA Social Work Advisory Council, the VA decided in 1962 to undertake a study to pilot test the employment of persons with a bachelor's degree and without social work education, who would be agency trained and function as assistants to the social workers. Seven representative VA stations—hospitals and clinics—participated in this pilot project. The focus was on task assignments of a limited and specific nature to be accomplished by the social work assistant rather than on the selection of cases that he might carry entirely. The work of the assistant was to be integrated into the social work treatment plan with the social worker retaining overall responsibility for the case. The study demonstrated conclusively that there were levels of social services—specific tasks—that could be identified and delegated to the social work assistant (SWA) and integrated into the treatment plan, resulting in more services to more veterans and more effective use of the MSW.[2]

ESTABLISHMENT OF THE SWA CATEGORY

On the basis of this study, in December 1965 the VA officially established the new category of social work associate (then called social work assistant) for use in its social work service programs. The position and its functioning were fashioned after the pattern demonstrated in the study. The focus of the job was on specific assignments rather than on selected cases that might be carried independently by this level of personnel—thus it was a task-oriented position. In general, these assignments, concerned with providing services to the individual patient, involve:

> (a) Provision of concrete and other environmental services in the context of sound patient-worker relationships; (b) Provision of selected referral services; (c) Provision of realistic information and guidance on a generalized basis; (d) Gathering information from a variety of sources.[3]

The establishment and growth of this position in VA hospitals and clinics have been slow but steady, deterred more by budgetary insufficiencies than by lack of conviction about its contribution. The initial impetus was in the psychiatric hospitals; general hospitals were slower to initiate the program. As of December 31, 1969, a total of 134 SWA's

[2] For a more detailed complete discussion of the study, findings, and conclusions, the reader is referred to *A Study of the Use of the Social Work Assistant in the Veterans Administration* (Washington, D.C.: Department of Medicine & Surgery, U.S. Veterans Administration, July 1965).

[3] Ibid., p. 3.

were on duty in 48 of the 196 stations, a small but significant number in relation to the more than 1,800 MSW's on duty. Eighty-two SWA's were employed in 26 psychiatric hospitals, 24 were in 15 general hospitals, 5 were in 5 independent outpatient clinics, and 2 were in one domiciliary. It is estimated that 250 SWA's have been employed since the program was initiated—a substantial number with which to have built up a significant experience.

MOVEMENT FROM THE TASK-ASSIGNMENT MODEL

A program guide was prepared before the position was officially established in the VA to provide concerned VA personnel with general information and guidelines regarding use of the SWA and the administration of this job category. The program guide was fashioned after the pattern of use of SWA's demonstrated in the pilot study. Thus all stations started with their SWA's on a task-assignment basis as prescribed.

The following statement from the foreword of the program guide was prophetic:

> Just as other guidelines are not static in their concepts or in their fulfillment, so it is with the understanding of the nonprofessional component of social work services contained herein. It is anticipated that continuing experience in the use of social work assistants will bring increased knowledge of the role they can fill in collaboration with social workers, in helping disabled persons toward recovery and maintenance of health, and of the administrative procedures which will promote the realization of this role.[4]

As the stations gained experience with the SWA's, many began modifying their approach, moving from the task-assignment model. On the basis of these modifications, more detailed study was considered essential. Two workshops were held with the MSW's most responsible for the SWA program at selected representative hospitals and clinics. During the workshops there was detailed review of the position of the SWA as it had evolved at each of the stations, its impact on the MSW, and its contribution to the total program. The purpose was to assess the overall development and direction of the use of the SWA. From these workshops it became evident that the position of SWA, while still evolving, had generally moved from the task-assignment model.

Each field station has considerable latitude to function as an independent entity within the framework of the VA mission, policies, and required regulations. With their individual problems concerning basic program needs, coverage, and staffing, each station modified and adapted the services of the SWA to meet and satisfy its own needs. In turn, the SWAs played a strong contributing role in changing their own function and expectations, bringing to the position greater abilities than they had been estimated to have.

All stations but two moved from the task-assignment model, having found it was unchallenging, failed to make use of the capabilities of the college graduate, and led to boredom on his part. MSW's referred

[4] *The Social Work Assistant in the Veterans Administration* (Washington, D.C.: U.S. Veterans Administration, March 8, 1966), Social Work Service, Program Guide, M–2, Part XII, G–4, p. ii.

tasks to the SWAs unevenly, perhaps because of their fears that the SWA's might usurp their own responsibilities or their consideration that task referral was not an efficient means of delivering service. The uneven work flow meant that the SWA's could not be self-regulating in their work, resulting in a waste of time.

Patterns of Functioning

Some of the different patterns of functioning and use of the SWA that have been evolving in the various stations are as follows:

1. The SWA may be assigned to and located on a hospital ward (most often a ward that, in view of staff shortages, does not have coverage by an MSW), where he can provide essential services and thus become in effect the social worker of that ward, under the direct supervision of his social work supervisor.

2. The SWA may be assigned to a specific program or unit such as the admissions unit or community care program, with responsibility for assigned segments of work and varying ranges of independent activities, but under the direction, review, and supervision of the social work program coordinator or supervising social worker.

3. Most hospitals assign social workers territorially, that is, with responsibility for a ward, medical service, or program. One hospital has tried a functional assignment approach instead with two social work teams: one team's assignment is planning patient discharge and follow-up in the community; the second team is assigned to cases involving adjustment to illness. MSW's were concentrated in the second team, while SWA's were assigned to the discharge-planning team with a supervising social worker as team leader. Discharge planning for patients from all of the medical and surgical wards was centralized on this team, so that the SWAs received all of the initial referrals for discharge planning and developed appropriate plans with patients and staff, participating alone or with the supervising social worker in the pertinent ward conferences with the medical staff team.

As the hospital gained experience with this approach, many advantages to this pattern were seen, but a major disadvantage outweighed the advantages—the SWA had to assume an unrealistic degree of responsibility for interpreting social work functions in the medical ward conferences. Social work service recognized from this experience that screening of referrals and interpretation of social work functions should rest with the MSW. A new approach is now being instituted at this hospital, reorganizing according to sections rather than functions, with teams composed of both MSW's and SWA's.

4. The social work team approach is used at several hospitals. The composition and size of the teams vary according to the specific overall team responsibility, but all have an MSW leader and SWA's. In one situation the team includes two levels of SWA's—experienced and beginning—and Neighborhood Youth Corps volunteers. In another situation the team consists of the MSW leader, the SWA's, and a nurse. The nurse is an essential team member because of the specific program of patient care being carried out by this team. The SWA's on the team are assigned cases by the leader, screened according to each

SWA's abilities. The SWA's have ready access to the leader when problems arise. In addition the leader holds regular meetings with his team members to keep abreast of developments in the areas of their assigned responsibilities.

Areas of Responsibility

In general the SWA does the supportive work and the MSW does more of the interventive treatment. The scope and extent of the assigned activities vary, but generally the SWA can do and is doing the following:

1. Obtaining social histories and other data pertinent to the patient and his situation, presenting observations of persons and situations, but not making the total social diagnostic assessments or evaluations.

2. As a participating team member, attending the medical team diagnostic and/or treatment meetings held to determine diagnosis and/or treatment plans when patients in the SWA's work load are being considered. The SWA contributes to the team meeting the social data he has acquired concerning the patient.

3. Helping hospitalized patients and their families to make appropriate plans for the patients' discharge from the hospital and return to community living. Discharge planning requires that the SWA know the patient's family and home situation, financial circumstances, medical/psychiatric situation and treatment care needs, preferences, and social-emotional requirements. The SWA must also be aware of available community resources such as nursing homes, foster homes, halfway houses, and other such homes in order to help the patient make the most appropriate plan for his return to community living.

4. Placing selected medical and psychiatric patients in a protected community care living situation such as a foster home, nursing home, boarding home, halfway house, or other such residence and then providing the veteran and the residence caretaker with the follow-up supervision and help required to promote and maintain the veteran's maximum level of adjustment.

5. Some finding and screening of foster homes, nursing homes, and other community care homes that would be suitable for referral of the patient following his discharge from the hospital.

6. Carrying some limited-goal cases on a one-to-one basis and on a group basis, as the only social work team member providing direct services to the patient and his family.

Evolution of the position of SWA from the task-assignment model developed out of both the demonstrated competence of the SWAs and the continued testing of new experiences by the stations. The speedy progression of the SWA in learning how to perform specific tasks and in increasing his knowledge and skills to do a more effective job earned him the more challenging type of assignment. This, combined with the stations' successful experimentation in using the services of the SWA in other ways than task assignments, has resulted in this more effective use of the position.

SWA's in Community Care Programs

This combined progression can be demonstrated by the evolution of the use of the SWA in community care programs at some of the hospitals. At first the SWA was given such task assignments as escorting the improved psychiatric patient from the hospital upon discharge to his new home in the community—i.e., a foster home or halfway house—and subsequently visiting him to observe his adjustment in the home. As the SWA demonstrated competence in observing the veteran's adjustment and the response of the residence caretaker to the veteran, he moved into an interventive role, handling problems that arose with the veteran or caretaker. He assumed the role of social worker for that veteran and responsibility for his ongoing supervision in that home.

In one home in which several veterans were living, the SWA was given social work responsibility for all the veterans in that home, thus becoming the social worker for that home and working with patients on both a one-to-one and a group basis. In time this SWA was assigned responsibility for all the homes within a given territory. Under the continuing close supervision and direction of the MSW, the SWA has been able to serve the patients in this program effectively. When the requirements of the patient's situation are too complex and demand more than the SWA can perform, the MSW will enter the case.

The MSW performs the same activities as SWA's, but in stations with both levels of personnel he generally retains the "treatment case," performs screening activities to access the patients and their needs, and handles complex personality situations. While the SWA may be responsible for various segments of the work on the ward, unit or program, the MSW remains accountable for assessment and treatment of the patient's social situation.

The MSW is heading into a new role of directing rather than providing service. He must still maintain professional judgment and responsibility for the services provided the patient by the SWA. The MSW will identify where the services are needed, both in the hospital and in the community. He is challenged to function at a higher level than the SWA and in a manner that will be visible to total hospital management.

ESSENTIAL WORKING HABITS OF SWA's

For the kind of services being required of the SWA in the VA medical setting there are certain working habits that are considered essential and that impinge on the SWA's behavior: recognition of his own competence and function, enough security not to try to handle patient problem areas or requests for social services that are not within his competence, enough self-confidence to turn for help to other sources when necessary, limiting himself to doing only that for which he has been prepared or trained, carrying the given assignment through to completion, willingness to share his patient with others, respect for medical and ward protocol, adherence to station procedures and regulations.

The SWA must be able to communicate verbally and in writing to the medical team, the social work team, the community, and manage-

ment—as appropriate to each situation—his social data and findings and his activities in behalf of the patient. Verbal and written communications are essential since the social worker is responsible to the medical team for the social aspects of patient care and can function responsibly as a team member only if he communicates. The SWA must be able to relate to patients. He must be able to talk with them, listen to them, and hear what they are saying. Similarly he must be able to relate to others with whom he works—that is, the other medical team members, social workers, persons in the community, administrative personnel, and so on. His behavior must reflect a liking for people.

The SWA must be able to use the assistance of and consultation with others with whom he is working. He cannot function as an independent entity but must work as one of many involved in the care and treatment of the patient. He must work within the limits of his job function and be able to coordinate his efforts with others. He needs to exert self-discipline when working with patients and to adhere to administrative requirements. He needs to know how to ask for and use consultation and supervision. He must behave responsibly, recognizing the serious consequences of his actions in dealing with people. He must be able to accommodate to a complex setting in which social work is only one part of many contributing to the whole.

Communication is an essential behavior that should be based in formal undergraduate training. Both SWA and MSW need early and continued training in verbal and written communication in order to achieve proficiency in succinctly, accurately, and briefly conveying pertinent data to others. The specifics regarding the individual hospital communications requirements can be taught on the job, but the basics of writing and speaking cannot and should not have to be. The other behaviors can be accomplished primarily through in-service training, especially since so much of the behavior is related to the specific needs of the medical care setting.

The number of SWA's in the VA with an undergraduate major in social work or social welfare has been minimal—only 6 out of 134 SWA's on duty December 31, 1969. The majority had majored in sociology; others had majored in such diverse fields as art, history, English, economics, education, social science, home economics, psychology, business administration, and government. Although the majority were new or recent baccalaureate graduates, some had several years of work experience in fields unrelated to social work.

Orientation and Training

The position of SWA was established with the basic premise that the SWA's orientation and training would be accomplished on an on-the-job training basis by the station employing him. Suggested orientation and training practices and goals are included in the program guide referred to earlier, including the teaching of pertinent social work knowledge, values, and skills in sufficient depth and breadth to enable effective task and overall job performance.

In-service training programs for the SWA's vary from station to station and are tailored to the size and focus of the program and the

activities of the SWA's. Considerable attention and planning are devoted to this at each station with continuing assessment of the SWA's needs and the appropriateness of the training in meeting these needs. There are group sessions, station courses, joint training sessions with other similar SWA programs, interstation workshops, attendance at university and other courses. These are all in addition to the one-to-one, ongoing training with supervisors.

As their experience has grown, the stations have been modifying and expanding their training programs with the SWA's in order to meet their specific individual needs. A representative example is one station in which the training program for SWA's initially consisted of regular individual contacts with the SWA's program coordinator or social work team leader for on-the-job training together with weekly group sessions of all the SWA's with the social work service training coordinator. As the SWA staff increased and they became more skillful, a more structured and intensified training program was instituted to meet their needs. Individual on-the-job training by the program coordinator or another MSW continued. A program of formal training and teaching courses was established with weekly lectures and discussion series presented by selected MSW staff, and members of allied disciplines. The scheduled weekly sessions focusing on social work knowledge, skills, and ethics presented by the MSW's progress from interviewing techniques, to social evaluation and diagnosis, to social work treatment techniques, to case recording. The series is providing realistic training relevant to what the SWA is doing in the VA and is promoting a closer working relationship between the MSW and the SWA.

Lacking specific studied assessment of the effectiveness of the various training methods used, the assumption, from what has been observed, is that what is being done is indeed effective.

Twenty-five SWA's at three of the hospitals were queried in an unstructured survey regarding their undergraduate training and its relatedness to their job as SWA's in the VA. Although the responses were varied, generally the SWA's emphasized the importance of a liberal arts education. In addition they voiced the need for undergraduate courses in human growth and development, counseling and interviewing techniques, and social work theory, and fieldwork placements in which they could experience work in an agency setting.

SUMMARY

In summary, in 1962 the VA initiated a pilot study to explore the feasibility of employing college graduates as agency-trained social work assistants who would function on a task-assignment basis. Based on the study findings, the position of SWA in the VA was initiated as a task-oriented job for persons with undifferentiated baccalaureate degrees. The SWA worked on specific assignments for which he had been trained on the job. Subsequent experience has resulted in a basic job change so that the SWA is now providing not just task-oriented service, but is handling selected cases and is being assigned to a program or unit with responsibility for segments or even the totality of the work,

undertaking these activities independently but under the direction, review, and supervision of an MSW.

Because of social work's responsibility to the hospital and to the medical care team for its professional contribution in the care and treatment of the patient, professional responsibility for the social services provided to patients must remain with the MSW. He is the person held accountable. However, under his direction the SWA can accomplish many of the activities that it was previously thought only an MSW could do.

Because of the complexity of the VA settings and the many variations in program operation among the many stations, on-the-job training for much of his assigned work will continue to be of primary importance for the SWA.

In the undergraduate program fieldwork placements are seen as contributory as well as courses on human growth and development, social work theory, psychology of personality and of deviant behavior, and interviewing techniques. However, a liberal arts baccalaureate sequence is seen as essential to provide an appropriate comprehensive base on which to build the specifics of the SWA. Without it, he will be missing the many contributions of man's thought and his approach to his environment, his fellow man, and the world.

Part Six

USE OF THE SOCIAL WORK TEAM WITH AGING FAMILY SERVICE CLIENTS

Leonore Rivesman [1]

Considerable uncertainty regarding the role of the baccalaureate social worker (BSW) in Family Service Association of America member agencies prompted the formulation of this study. In 1965, when the study [2] was conceived, young college graduates were being employed in a minority of FSAA member agencies, usually as a result of personnel vacancies rather than out of any conviction that some responsibilities could be eminently appropriate for them or that they could enhance agency programs and services. At FSAA there was a notion that this might indeed be so. It was also thought that "mature women"—for project purposes defined as those over 35 years of age—might provide a more stable source of manpower than recent college graduates, who were either leaving to enter graduate schools of social work, with the agencies' blessings, or, without agency consent, getting married and (in the case of women) getting pregnant. It was assumed that older women would have passed the early child-rearing stage and that, given certain personality qualifications, their life experience might adequately compensate for lack of the MSW degree.

PROJECT AIMS

Concomitant with this interest in the differential use of manpower, FSAA was concerned with the need to upgrade services to the aging, which in many FSAA agencies, as in other settings and in the other helping professions, had been accorded low priority. The central purpose of this project was therefore defined as the enrichment and extension of family agency services to the aging and their families. Within this overall purpose of service enhancement, major aims were specified in the proposal as follows:

[1] This project was conducted under the auspices of Family Service Association of America, supported by a grant from the National Institute of Mental Health. Leonore Rivesman, MSW, was Project Director, Social Work Teams With Aging Family Service Clients, Family Service Association of America, New York, N.Y.

[2] The participating agencies were Jewish Family and Children's Service, Baltimore, Md.; United Charities of Chicago, Chicago, Ill.; Family Service of the Cincinnati Area, Cincinnati, Ohio; Jewish Family Service Association, Cleveland, Ohio; and Jewish Family Service, Philadelphia, Pa.

1. To develop and test the use of a social work team consisting of an MSW caseworker as leader and a mature BSW as assistant. The "team" was in fact a service dyad.

2. To develop a method by which cases might be carried appropriately by the unit in terms of the needs of the client and his family and the client-caseworker relationship.

3. To develop and test a new type of relationship between MSW and BSW, in which the MSW is both the collaborator and the supervisor of the BSW.

4. To demonstrate a different pattern of service, not only oriented to the acute problem presented at intake, but continuing over as long a period as is in the interest of the client and his family.

5. To evaluate this new service pattern.

The proposal specified a 2½-year demonstration period during which time service by the team was to be developed and data were to be collected for research purposes. The research schedules were designed for the purpose of obtaining systematic data regarding the dyad. They combined the use of check lists and questions that required narrative responses. To ascertain the effectiveness and the limitations of this experimental structure, sequential information was required:

1. Regarding the cases, the problems presented by the client, the services offered, and the outcome of service.

2. Regarding the team, the services carried by the MSW, the services carried by the BSW, the content of supervision of the BSW, and the tasks that were successfully or unsuccessfully carried out by the BSW.

This report is based on a synthesis of the data provided in the schedules and on information accumulated in field visits to the participating agencies, from meetings at the FSAA national office of different levels of staff from the participating agencies, and from annual reports by agency administrators to the project director.

This project was modestly scaled. National office staff consisted of a project director, a research assistant, a research consultant, and a secretary. Five FSAA member agencies were involved, with one team in each agency. Four of the five agencies had a special department of services to the aging; one agency did not differentiate its caseloads but assigned a worker to the project who had prior experience with aging clients. The aging clientele (persons 60 years of age and over) comprised from 10 to 30 percent of the total agency caseloads.

PERSONNEL REQUIREMENTS

The proposal specified that the professional caseworker (team leader) have a master of social work degree, already be in the employ of the agency rather than being engaged specifically for the project, have experience in working with the aging, be comfortable and skillful in his practice, be imaginative, and have an interest in experimenting in the new team service to define his role and that of the BSW with respect to individual cases.

The social work assistant (BSW) was to be newly employed by the agency, 35 years of age or over, and have successfully completed

2 or more years of college or the equivalent. Personality qualifications were amplified as follows:

1. *Sensitivity:* capacity to relate emphatically, listen receptively, respond with warmth, interest, and spontaneity, and establish and sustain relationships over an extended period.
2. *Sound judgment:* ability to assess situations realistically and to differentiate subjective from objective reactions; common sense.
3. *Tolerance:* respect for individual differences in standards, values, and life-styles; acceptance of idiosyncratic behavior.
4. *Patience and flexibility:* ability to defer appropriately to the client's pace and to work within the limits of the BSW position and the agency's policies.
5. *Resourcefulness:* capacity to conceive construction alternatives in problem-solving.
6. *Intellectual curiosity:* an interest in and some understanding of human behavior, interrelationships, and social problems; interest in the acquisition of further knowledge in these areas.
7. *Receptivity to serving the elderly:* to work painstakingly with them and in their behalf.
8. *Interest* in contributing to and learning from the project experience.

In the course of this project there has been a marked shift in the opinions of agency administrators as to the availability and suitability of mature women for jobs as social work assistants. Their previous preference for young college graduates had been based on the assumption that these would be more flexible and adaptable than "retread housewives." Only one of the five executives had been readily in accord with the age requirement set. The other four more or less reluctantly acceded because an explicit project aim was to tap a source of manpower from which family agencies had not previously drawn. In their final reports, the administrators consistently emphasized personality qualifications as being of prime importance and deemphasized youth and educational requirements per se. They also indicated that they regarded mature women as a more stable manpower source and planned to continue to recruit from the 35-and-over group.

It should be noted that observations made throughout this report are based on experience with a somewhat larger group of workers than would be assumed from the original plan. During the 2½-year demonstration period there was a total not of five BSW's and five MSW's, but of nine different BSW's and seven different MSW's. One agency had replaced one BSW; a second agency replaced two successive BSW's; and a third had, from the beginning, two part-time BSW's (3 days a week each). In two agencies the team leaders were replaced, one within 2 months and the other 14 months after team functioning had begun.

PROFILE OF THE CASELOAD

Before describing the activities and gradually changing tasks of the team members it might be well to provide a profile of the project caseload and a brief description of the nature and purpose of the service to

these clients. From data supplied on intake schedules for 282 clients, a profile of the clientele was drawn that appears to be quite characteristic of services-to-aging cases in family agencies generally.

Twenty-six percent of the clients were between 60 and 69 years of age; 49 percent were between 70 and 79; and 21 percent were between 80 and 89. Only 29 percent were male; 71 percent were male. Fifty-one percent were widowed; 35 percent married; 14 percent single, divorced, or separated. About half lived alone in apartments or houses, rooming or boarding homes, or cheap hotels. Their major source of income was social security augmented by meager savings, small pensions, assistance from relatives, or public assistance. Average total annual income hovered at or near the poverty line. The major presenting problems (and rarely did these clients present only one problem) were physical health, problems in adaptation, intrafamilial problems, inadequate income, and unsatisfactory or inadequate housing.

Examination of the clients' problems clearly indicates that these are tangible and that the nature of the service must be equally tangible, aimed at ameliorating the hazards associated with ill health, low income, and poor living arrangements. Service directed at mitigating psychological problems has an almost equally concrete quality. The problems that were identified in the research schedules as "problems in individual adaptation" most usually related to difficulties in adaptation to the vicissitudes of aging that are experienced by clients as insults to their self-esteem. Aging clients' losses are multiple: of health and strength, of gratifying familial and social roles, loss through death of marital partners, relatives, and significant others.

Most of the persons on the caseload who had problems of adaptation could meet the basic requirements of daily living, but many appeared to be emotionally depleted. They were lonely, seclusive, mildly depressed, prone to make little or no demands of life or to be unrealistically demanding. Obviously little restitution can be made commensurate with their losses, their earlier deprivations, or their unsatisfying familial relationships. The latter problem is generally a longstanding condition exacerbated both for the elderly patient and his children by the destructive impact of the problems of aging. This impact can be weakened through practical services that are most often more meaningul to this clientele than "talk" per se, especially during the early stage of contact and at other critical periods when calamities overtake them. These features of service to the aging make it a natural for the use of judiciously selected BSW's, since the dominant qualifications for offering such service are capacity to relate with empathic understanding and to *do*.

TASK DIFFERENTIATION

Had the nature of the service been as clear at the inception of the project as it subsequently became, the researchers could have proceeded less conservatively. However, only as the project experience unfolded and the BSW's demonstrated their capabilities and developmental capacities did it become obvious that more and more of the MSW's usual role could be assigned to the BSW.

The MSW's initial opinions regarding appropriate tasks for BSW's ran the gamut of possibilities from "anything we can do, we can teach t. m to do," to anxious concern that the quality of service would be irrevocably impaired unless assignments were carefully restricted. The most characteristic attitude was considerable caution. "Task" in the first 6 months of team operation was construed to mean a circumscribed activity such as accompanying a client to a resource. However, by plan this was to take place within the framework of a continuing relationship in which the BSW was to offer acceptance and encouragement. As BSW's manifested their supportive capacities the team leaders increasingly encouraged and helped them to deal with clients' attitudes and feelings. Gradually tasks began to be understood as "units of service involving a process and a relationship." This concept did not, however, vanquish the ambiguity regarding the tasks that had to remain in the team leader's domain.

Complexity of Problem

During the course of this project much attention was directed toward trying to develop consistent criteria for task differentiation. One possible factor examined was complexity of problem. It was found that in this caseload situations that might be characterized as "complex" were no longer so when analyzed, or else they had a large element of chronicity. The chronic situations appeared to be immutable at this stage in the clients' lives. It was concluded that it was best to limit the team effort in such cases to supervision of the BSW in her work with practical problems that had a possibility of being ameliorated.

Degree of Pathology

Degree of pathology was another factor that was considered but discarded as a basis for determining task differentiation. There were some severely disturbed clients whom the MSW thought he must retain and others who were shared with the BSW. The course that was followed seemed to be determined by the MSW's clarity about the diagnosis and service goal. If he thought he could help the BSW to understand what changes could and could not be expected in the clients' behavior, he was likely to share the case or assign it to the BSW totally; otherwise he retained it.

Concreteness of Problems

Team leaders tried to differentiate their tasks from those of the BSW by suggesting that if the client's psychological problems were tied to reality problems, a BSW could deal with the situation, but if the problems were intrapsychic, they required direct professional intervention. However, on closer examination the so-called intrapsychic problems of this clientele were seen to be mainly emotional and adaptive problems caused by very real decrements and losses. These problems were as anchored to reality as medical and financial needs and were often most appropriately handled by BSW's through engagement with the client in concrete activity, for example, taking an overwhelmed and confused widow to the resources that would enable her to clarify the facts about

her situation—a lawyer, a real estate agent, property clerk, social security office, the department of welfare, and so on.

As the MSW's accumulated increasing evidence of the effectiveness of the BSW's activities in enabling clients to cope and as BSW's demonstrated their ability to sustain meaningful relationships with clients regardless of whether action was indicated at a given time in a given case, it became increasingly less valid to differentiate tasks on the basis of whether the problem was internal or external.

Decisionmaking

A similar development was experienced with reference to using decisionmaking as a rationale for professional intervention. It had been thought that momentous decisions such as a radical change in living arrangements might require professional assessment of means of direct contact with the client. It was increasingly found that assessment usually could be based on the BSW's report to the professsional regarding the situation, but that sometimes the BSW required the MSW's presence at an interview or series of interviews when clients were faced with such decisions as liquidating a home and going into institutional care. There is an element of finality in such a change that is sometimes too poignant for a worker—trained or untrained—to bear. It is legitimate for staff members to fortify each other in such situations. It is likely that in the future more experienced BSW's will provide such help to their less experienced peers.

Conclusions

Pending the completion of analysis of terminal schedules, the tentative conclusion regarding task differentiation is that this was based predominantly at any given time during the demonstration period on the following:

1. The team leader's assessment of his assistant's abilities.
2. The extent of the team leader's confidence in his own diagnostic abilities and his own clarity as to service goals.
3. The impact of a given situation on both the professional and his assistant at a given time.

The clear trend was one of diminishing direct intervention by the MSW both in the number of cases handled and in the number of contacts in a given case. By the time the demonstration period ended, the BSW was replacing the MSW in the provision of direct service. The MSW's major professional responsibility had become supervision of the BSW.

TRAINING OF BSW's

Obviously these developments did not ensue exclusively by virtue of the BSW's talents. A heavy investment by the team leader in training the BSW was necessary. The method was essentially tutorial—a costly procedure, but one for which in this project theere was no alternative. The proposal had described training as task oriented; the BSW was to "learn by doing." As "doing" expanded, so did the content of supervision, and as BSW's demonstrated their capacity to integrate the super-

visory contribution with their practice experience, the team leaders found they were teaching casework practice in service to the aging.

Importance of Theory

In the unstructured "course" that evolved, the extent to which theory was explicated varied, depending largely on the proclivities of the team members. In the early phase of the demonstration there was a considerable range in the extent to which BSW's appeared to welcome theoretical underpinning either from the MSW or from the professional literature. By the end of the demonstration, however, even those who had seemingly been the least interested in theory were reaching for it.

The MSW's opinions as to the relevance of theoretical content seemed to have a positive correlation with their capacity to provide it. The researchers have noted, quite apart from this project, that graduate social workers seem to range from those who have so well integrated theoretical formulations that they can distill these appropriately and intelligibly, to those who seem to be rummaging in a reticule to retrieve remnants of theories from the casework and human behavior sequences of their past. Allowing for some exaggeration, the analogies seem to hold for this project.

The fact is that whether theory was presented adroitly or somewhat awkwardly, the need for it was manifest in order to maximize the BSW's helping capabilities. Although the BSW's had much to offer out of their sensitivity and life experiences, their intuitive insights had to be put into a theoretical context to enable them to live with the multiple stresses with which their aging clients confronted them. Theory afforded the means by which the BSW could be helped to achieve sufficient psychological separation from the client; it was the tool by which the discouragement or immobilization with which overwhelmed clients can infect workers could be overcome. Theory deepened their understanding and enhanced their capacity to relate appropriately and it provided the means by which learning could be carried over from one situation to another.

The team leaders reported they were explicating theory on an "as-needed" basis. The needs were largely connected with problematic aspects of the client-BSW relationship. The BSW's needed help in learning how to proceed at the (often slow) tempo of their clients, in accepting dysfunctional decisions made by some clients, in overcoming their own overprotective attitudes and occasional overidentification either with the aged parent or the adult child, and in coming to terms with mortality. They needed help in holding to reasonable limits and in dealing with the inordinate demands that some clients made of them. Clarification and support were necessary to help the BSW's assimilate both the clients' ambivalence and their own. They needed help in understanding the double messages sent by clients who were caught in conflict between their dependency needs and their strivings to maintain independence. They also needed supervisory encouragement in identifying those insights, attitudes, and judgments that exerted a strongly constructive influence on their relationship with clients. They needed support in proceeding with some of the original notions they

had about using informal resources in the clients' environment, and they needed approval for the painstaking way in which they dealt with the clients' needs.

In summary, the generic casework concepts that were taught to the BSW's on the project are the sine qua non of any training program for social work assistants: the principle of confidentiality, the precepts of proceeding at the client's pace, respect for the right of the individual to make decisions based on his own choice, the fullest possible utilization of the client's strengths, and so on. Service to the aging obviously also requires the incorporation of specific knowledge about problems associated with the aging process: the effects of multiple losses on the client's coping capacity, the emotional stress that accompanies physical illness, the trauma of removal from a familiar setting, the struggle between the desperate need to maintain one's independence and the pressure of intensified dependency needs that stem from declining strength and decreasing resources.

Group Training

Virtually all of these training requirements can be met more economically and effectively through a group training process, and those agencies that added BSW's to their staffs following the close of the project did in fact initiate such meetings. Those that were geared especially to service to the aging generally concentrated on the special knowledge that work in this area requires. Those agencies that had one training group for all the BSW's working in the agency generally described the content as "basic concepts about human behavior," "basic casework concepts," or "interviewing skills."

In general, group training in the project agencies augmented the training provided through supervision. As agencies develop their training methods further and as BSW's increase numerically, it is anticipated that ultimately the pattern will be reversed—that is, that group training will become the major method and individual supervision will become ancillary to the group process.

Project assistants were always included in staff meetings and seminars, and it may well be that, in part, their heightened interest in theory can be ascribed to the stimulation provided in these meetings, which dealt with a variety of practice issues. The BSW's report that they value "assistants only" meetings as much as participation in professional meetings, and they want continuing opportunities for both.

Early in the project administrators differed rather markedly as to whether they would encourage BSW's to take extramural courses. Some seemed to fear contamination of their BSW's, others were dubious about BSW's motivation for this. More recently there has been an inclination to encourage attendance at appropriate courses.

Summary

In summary, there appears to be no preordained end-point in the developmental capacities of BSW's and, therefore, there can be no rigidly set boundaries in training. The training program for BSW's needs to be designed so that it is consistent with their neeeds vis-a-vis

the agency's expectations of their performance. As BSW's performance levels are raised, agency expectations of them undergo upward revision, which in turn is likely to create a demand for further training. This is inevitable so long as agencies employ mature, intelligent, resilient persons. Such workers will obviously not be content to remain at the same level of functioning for an indefinite period. They will either deepen their level of operation in the same areas or will want assignments in other areas with new and additional responsibilities. In either event, the agency needs to be prepared to support such developments with appropriate intra- and extra-mural training plans.

EFFECTIVE TEAM FUNCTIONING

As the researchers have reported on the successful training of the project assistants and the effective functioning of the teams, we have been asked how to "match personalities" for productive teamwork. It has not been possible to identify any personal qualities that differ from those that are essential for effective social work practice in general. The teams worked well when each team member was reasonably secure, tolerant, flexible, self-aware, highly motivated to learn, and deeply committed to quality of service. When these qualities prevailed it was found that team members were well able to weather, without undue strain, the assorted personal idiosyncracies from which no educational level of personnel is exempt.

Regarding qualifications of team leadership, experience points up the importance of using team leaders who have demonstrated skill in the area of service in which the team is to work. It is not considered coincidental that the most productive teams were those in which this specification was most fully met.

Regarding the tasks at which BSW's were not successful, we can only generalize. Unsuccessful performance seemed to be the result of certain personality limitations—especially rigidity—and when this was apparent the agencies engaged in what is euphemistically known as "helping the employee to leave." It may be too that data on the areas of unsuccessful functioning are meager because team leaders were conservative in their assignments until the BSW's capabilities were demonstrated and until they were confident that the BSW's knew when to ask for supervisory help or direct supervisory contact with the client.

The dyadic operation was based on the premise that BSW's or their team leaders would move in and out of active contact with the client as the situation demanded. Since this was built in BSW's felt no onus on them when they asked the MSW to see a client or family because they felt beyond their depth. Similarly, when the MSW thought he needed to see a client himself in order to clarify a diagnosis or reassess the service goals, he did not feel threatened or threatening.

While this may not be an innovation in other functional settings, it has not been a common procedure in family service agencies, ostensibly because the supervisor has not wanted to "undercut" the supervisee or to confuse the client. The team procedure demonstrated that a supervisee need not feel denigrated by supervisory intervention and that

clients are not confused by consultation with other staff members. On the contrary, it signifies to them the agency's depth of interest and concern and gives them an added sense of being protected and cared for. This point of view infiltrated the nonproject staff and is an added increment of the experimental use of the dyad.

Additional values of the dyad were that the unremitting attention directed at determining what tasks could be allocated to the BSW necessitated special attention to her talents and developmental capacities. These consequently became highly visible and resulted in much more profound convictions regarding the productiveness of BSW's. Acting on this conviction, four of the five project agencies' executives obtained additional funds to add BSW's not only in services to the aging but in other services as well.

Additionally, the successful collaboration has stimulated interest in a broadened concept of team as it is related to other agency services and processes. Some of the project agencies planned to pursue the development of enlarged teams to include persons with different levels of competence and expertise.

ENRICHMENT OF SERVICE

The major achievement of the project is the fulfillment of its central purpose of demonstrating enriched and extended service through deliberate and planful utilization of BSW's.

MSW's Contributions

The quality of the MSW's functioning has been enhanced most markedly in the following areas:

1. Enhanced ability to work as team leaders, in training, supervising, and delegating responsibility.
2. Diagnosis and treatment planning.

   a. The BSW's, in providing additional information and observations about clients' functioning in their daily lives, added another dimension to professional diagnosis. Treatment planning has become more realistic as a result of the demonstrated value of using tangible methods to alleviate psychological as well as concrete needs.

   b. The project-incited need to conceptualize the basis for task differentiation and the necessity of teaching the BSW have sharpened the workers' thinking about service goals and consequently have made service more consonant with clients' needs. For example, earlier apprehensions about introducing too many agency staff members to the client have been replaced by evidence that for the depressed and socially isolated the introduction of an additional concerned person is in itself an enrichment of service. Although the trend is to decrease direct contact by the MSW and increase contact by the BSW, the concept of using more than one person has remained—with BSW's now asking for augmentation of *their* services via volunteers, friendly visitors, homemakers, home health aides, and the like.

BSW's Contributions

Service has been enriched not only through BSW-client relationships and activities, but also because of the advocacy role that BSW's undertook in the course of expediting service from other agencies, especially health and welfare institutions. They also enriched service through their use of innovative methods of enlisting informal resources in the clients' behalf.

Concurrent with the expansion of BSW's responsibilities in providing direct service, the agencies gradually enlarged the scope of the BSW's activities to broaden or enrich the total program. These assignments developed out of a combination of specific program needs in each of the agencies and the particular talents and interests of the different BSW's. Among the most prominent responsibilities were these:

1. Location and evaluation of boarding homes or private residential arrangements; responsibility for the agency's continuing contacts with the homeowners as well as the clients placed in these homes.

2. Location and evaluation of community resources required by the aging: medical resources, convalescent homes, nursing homes, recreational facilities, low-cost housing; updating and maintaining resource files.

3. Recruitment, orientation, and supervision of volunteers and paid friendly visitors; supervision of homemakers on service to the aging cases.

4. Interpretation of the agencies' services to various community groups for the purpose of increasing referrals to the agency.

5. Responsibility for representing the agency by appearance on a regular, planned basis at senior citizens' clubs or in low-cost housing projects to make service more readily available.

6. Specialization in certain areas such as the ramifications of Medicare and Medicaid, and the strategies to use in cutting through the red tape of other agencies.

REDEFINITION OF ROLES

We do not think that the outer boundaries have as yet been reached regarding either the extent of direct service or the extent of program activities that can be carried by BSW's. It is obvious, however, that studied use of BSW's inevitably results in redefinition of the role of the professionally educated worker. The beginning of this was seen during the demonstration period—in the demonstrated feasibility of using the MSW for team leadership and in training and supervising BSW's. Additionally, in one agency the project worker has been designated as a consultant to other staff members who carry service to the aging cases; in another agency exploration is currently under way regarding the feasibility of providing consultation to nursing homes; in another the quality of direct service has been enhanced through group counseling of the aging—a far more effective modality for many of the older persons than individual counseling.

Much of the MSW's time was preempted in this project by training of the BSW and by research requirements. Maximization of profes-

sional functioning needs to follow the integration of BSW's into an agency and cannot be expected to be fully realized until this has been accomplished. Furthermore, redefinition of the role of the MSW does not occur spontaneously. It requires reevaluation of programs, purposes, and methods by the total agency staff and board. On the basis of experience in this project it seems likely that reassessment of the MSW's reesponsibilities, in light of the succeessful use and numerical increase of BSW's, would result in changes in at least four areas:

1. The development of more effective treatment methods (for example, group counseling of the elderly, group counseling of the distressed families of the elderly, and family treatment that includes children, parents, *and* grandparents).
2. Development of skill in group training methods to supplant the tutorial type of training and supervision.
3. Expansion of the concept of team service to include staff members with varying educational backgrounds and skills.
4. Involvement of MSW's in the development of new services both within the family agency and in the community.

In the FSAA position statement on the use of social work assistants it is noted that "the addition of new levels of staff is not simply additive to the system, but also changes the system by a kind of 'ripple effect'." [2] Findings from the present project provide documentation of the statement that summarizes the "ripple effect" as follows:

> Continued experience in using social work assistants may be expected to extend and deepen the roles that are deemed appropriate for such personnel in family service programs. . . . As this process goes on, the job of the professional worker in direct service will be simultaneously redefined and increasingly specialized, with some workers developing advanced clinical skills, some supervising and administering the "service mix" that involves various levels of staff, and some carrying out newly developing types of service in consultation to other agencies in the community.[3]

IMPLICATIONS FOR THE EDUCATIONAL CONTINUUM

Developments such as these obviously are highly germane to curriculum planning in the graduate school of social work and also have their implications for the baccalaureate social work major. The fact that the present project confirmed the efficacy of employing carefully selected persons who lack academic preparation for social work in no way obviates the desirability of such preparation. There is a considerable body of evidence to support the fact that social service institutions need and can productively employ persons with a vast range of educational backgrounds, talents, and capabilities.

This is certainly true in the field of services to the aging in a host of different settings. Persons are needed whose educational experience covers the full range from vocational and technical training through doctoral study. In a report submitted by the Surveys and Research Corp. under an Administration on Aging contract, it was estimated that at

[2] "Social Work Assistants in Family Service Agencies," report from the Personnel Committee (New York: Family Service Association of America, April 1969), p. 13. (Mimeographed.)

[3] Ibid., p. 8.

least a third of a million professional and technical workers are employed in programs serving older people, and that 80–90 percent of these have had no formal preparation for their work. It was stated that the need for social workers, social work aides, and community aides trained to serve older people runs into many thousands.[4] From our knowledge of the nature of these programs, we believe that many social work positions could be satisfactorily filled by BSW's. What content should be covered in the curriculum to prepare persons for such employment?

Our primary recommendation is not for courses in gerontology per se. Rather, our major concern is that the basic courses include gerontological content. We suspect that social work educators, as much as anyone, are prone to recoil from contemplation of the last phase of the life cycle. The aging process is associated with decline and deterioration and few people in our culture can face intimations of mortality with equanimity. Hence the semester often ends "before there is time" to include content on the aging. How can this tendency be countered? We can only urge that such courses as human growth and behavior, social welfare, and practice theory consistently include material on the aging. It is also recommended that social work educators examine whether field experiences in gerontological settings are utilized as fully as they might be. Further, would it be unseemly to ascertain whether content on aging is included in social science courses? in sociology? anthropology? psychology? in courses about contemporary social problems?

Social work educators should be in the forefront of efforts to break down this nation's pattern of institutionalized rejection of the aged. In the process they might learn that there is a host of curative, rehabilitative, and supportive techniques to help the aging overcome some of their problems. Such knowledge is a useful weapon in combatting pessimism and forebodings of ineffectuality. Additionally, learning about the healthy aging and the dynamic program possibilities aimed at prevention provides another means of counteracting discouragement.

To impart information and knowledge about gerontological matters requires no major curricular changes. It requires only that faculty members be psychologically available for the subject. When they are, students may well be increasingly motivated to enter this area of social work. There are increasing numbers of college students who are highly sensitive to those rejected by society and who want to engage in constructive activity directed at change. They should be afforded a chance to learn about opportunities in gerontology for the realization of such goals. There is also a rich reservoir of young adults who quickly identify and repudiate the fraudulent. What is more visibly fraudulent than public officials' expressed concern for the aging when viewed in the light of the limited support given to programs and services for the aging? Enabling students to put public statements in juxtaposition to

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[4] *Developments in Aging, 1969*, a Report of the Special Committee on Aging, U.S. Senate Report No. 91-875 (Washington, D.C.: U.S. Government Printing Office, 1969), pp. 139, 140.

the facts would enlist more students in the effort to "turn things around" for and with the elderly.

If our colleagues consider these hypotheses highly conjectural, a search for hard data would harm no one and would be helpful to many!

Part Seven

THE SYRACUSE UNIVERSITY PROJECT ON THE COMPLEXITY-RESPONSIBILITY SCALE

Donald E. Johnson and Ellen P. Lebowitz [1]

The National Association of Social Workers' Utilization of Social Work Personnel Project conducted by Barker and Briggs documented the extent of the shortage of professionally trained personnel in social work and also explicated what the researchers felt were the major reasons for the existing and inevitably continuing shortage of professionally trained personnel:

> There are five major reasons for the continuing shortage of social workers: (1) the limited capacity of graduate schools of social work, (2) failure to recruit people into the field in sufficient numbers, (3) increasing demands for social work services, (4) inefficient means of service delivery, and (5) inefficient utilization of subprofessional social work personnel.[2]

Two other findings of the NASW study have significance and implications for utilization and educations of subprofessional personnel: (1) baccalaureate-level personnel comprise the largest manpower resource available to provide direct services within the Nation's State mental hospitals and (2) for the most part, baccalaureate- and MSW-level personnel are used interchangeably in the fulfillment of social work activities. However, from the viewpoint of the chiefs of State mental hospital social service units, there is a contradiction between the real and the ideal. The social work chiefs viewed the baccalaureate-level worker (BSW) as being utilized almost exclusively in activities pertaining to the provision of concrete needs—financial assistance for the acquisition of food, shelter, and clothing; finding gainful employment opportunities; providing transportation, and so on. On the other hand, the social

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[1] The content of this paper is both an abstract and an elaboration of a research project completed in 1969 under the direction of Thomas L. Briggs, Associate Professor and Director of Continuing Education and Manpower Development, Syracuse University School of Social Work, Syracuse, N.Y., and funded by the New York State Department of Mental Hygiene, Albany, N.Y. Donald G. Johnson, MSW, and Ellen P. Lebowitz, MSW, were graduate students enrolled at Syracuse University at the time of the study.

[2] Robert L. Barker and Thomas L. Briggs, *Differential Use of Social Work Manpower* (New York: National Association of Social Workers, 1968), p. 23.

work chiefs viewed activities pertaining to casework therapy as being within the exclusive realm of the MSW.

Thus when considering the realities facing the social work profession—that BSW's comprise a large manpower pool and are being used in many professional activities—it seems paramount that attention be focused on the activities that BSW's *can* perform and the cognitive knowledge base and social work skills necessary to enable them to perform these activities. Such a focus could also lend itself to the legitimation of the undergraduate social work major as a separate and distinct professional entity.

Specification of those social work activities that can appropriately be performed by BSW's implies that some criteria for categorization can be identified and operationalized into an instrument capable of analyzing activities in relation to these criteria. Two such criteria are complexity and responsibility. Use of these criteria could result in the identification of a hierarchy of social work activities. A statement justifying such an undertaking could read as follows:

> Facilitating the optimal utilization of *all* levels of personnel necessitates a rational allocation system of social work activities to personnel with varied educational and experi- ntal backgrounds. The ideal situation of matching personnel skills, knowl and experience with client needs, or the activity which must be performed to meet them, would certainly maximize the opportunity for the effective and efficient attainment of the service organization's goals and objectives.[3]

The following presentation will report on the development of such a complexity-responsibility measurement instrument, its utilization, and its implications.

DIMENSIONS OF SOCIAL WORK PRACTICE

The Complexity-Responsibility Dimensional Measure (CRDM) was based on a model of a complexity-responsibility continuum as a rational means of differentiating among social work activities and their consequent deployment to various levels of personnel.[4] Kidneigh's suggested instrument would include five conceptual items or dimensions that collectively embrace all essential dimensions of social work practice. Each of the dimensions captures characteristics inherent in a social work activity and/or in the worker's responsibility for performing that activity adequately and successfully. A brief definitive statement of each dimension follows.

Originality and Initiative

> The requirement to produce new or novel ways of doing things (to invent) combined with the right and power to initiate action (implying mental freshness and vigor with the aptitude to develop or undertake new enterprises), that is,

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[3] Thomas L. Briggs, Donald E. Johnson, and Ellen P. Lebowitz, "Research on the Complexity-Responsibility Scale: An Approach to Differential Use of Hospital Social Work Staff in the New York State Department of Mental Hygiene" (Syracuse: Syracuse University, 1970), p. 5. (Mimeographed.)

[4] John C. Kindneigh, "Restructuring Practice For Better Manpower Use," *Social Work*, Vol. 13, No. 2 (April 1968), pp. 109–114.

a general versus a specific assignment, can be called "power to start" or originality and iniative.[5]

Judgment

The right and power to exercise judgment varies in degree and is implicit in any duty function. The judgments may be any combination—in degree—of (1) determination (deciding *what* to do), (2) application (deciding *how* and *when* to do it) or (3) interpretation (defining objectives by decisions with binding precedent).[6]

Extent of Independence

When the duty requires the assumption of a high degree of independence, autonomy with a minimum of direct supervision or control exercised by another office (supervisor) but with a delegation of responsibility under general rather than specific direction of a superior office, it can be said that the particular duty function ranks high in responsibility and complexity.[7]

Expressive Requirements

. . . refers not only to the act of uttering, declaring, or representing by written or spoken language, gesture, or look, but also to the effectiveness of the utterance or manifestation of thought or feeling.[8]

Contact with Persons

Whenever a duty function requires a relatively intense relationship with another person or a requirement to relate meaningfully to persons of power and influence in the community or the agency, one can say it is higher in complexity and responsibility than when the requirement is for a relatively superficial contact with others.[9]

The significance of these dimensions seems to be twofold: first, utilized collectively, in conjunction with a weighted value schema, they give a "relative" complexity-responsibility weight to any social work activity tested and, second, the median rank (according to importance) ascribed to each dimension for a given activity implies the nature of education and/or training needed by the worker to complete the activity successfully.

Kidneigh further explicates the dimensions of complexity-responsibility by postulating that the importance of each dimension for a given activity is a function of various organizational and personal determining factors. In Table 1 one can see the effect of the determining factor on the importance of a dimension for a given activity.

DIFFERENTIATION OF SOCIAL WORK ACTIVITIES

It was from these nine mutually exclusive determining factors that a questionnaire was formulated to serve as the CRDM instrument. Formulation of the questions occurred in the following manner: First, 38 statements were formulated that best captured the essence of the nine determining factors. Second, 10 of the most reflective items were selected by a Syracuse University School of Social Work faculty panel. Third, these 10 "most reflective" items and their opposites were formu-

[5] Ibid. p. 111.
[6] Ibid. p. 112.
[7] Ibid.
[8] Ibid. p. 113.
[9] Ibid.

Table 1. Dimensions of Complexity-Responsibility and Their Component Determining Factors

Determining factors	Dimensions of complexity-responsibility				
	Extent of independence	Expressive requirements	Contact with persons	Judgment	Originality and initiative
The specifity of the guidelines provided	X	X		X	X
Freedom to change matters		X	X	X	X
The range and amount of knowledge an incumbent must command		X	X	X	X
The nature of the supervision to be exercised by the incumbent of the immediate superior office	X				
The extent to which self-control must have been developed	X				
How much the incumbent will be required to formulate the content of text, interview, speech, or acting in the normal course of his work		X			
The organizational levels of the initiator and the receiver of the contact			X		
The degree of subordination to a position of higher rank			X	X	
The amount and kind of reporting to superiors required	X				

lated into a continuum of response for each factor. Each of the 20 items thus generated was measured by a five-point rating scale ranging from "strongly agree" to "strongly disagree." The five-point continuum provided a basis for attributing a total score to each social work activity tested, and each activity's mean score would place it within a hierarchical arrangement of activities on the basis of its degree of complexity-responsibility.

The questionnaire thus designed was used to differentiate, in terms of complexity-responsibility, among seven of the many social work activities performed in state mental hospitals.[10] The seven selected activities rated highly in one basic criterion—time allocated to the performance of the activity—since it was the researchers' contention that this was a basic indication of an activity's importance. The seven activities thus selected exhibited the following differences in terms of time spent by the BSW or MSW: they represent one-third of the actual working time spent by MSWs and one-half of that spent by BSW's in the fulfillment of their professional roles. Thus in a sense the activities selected were more in the realm of BSW-level practice than MSW-level practice if time allocation is an indicator of one's professional realm. The seven activities are as follows:

1. Determining the need for and facilitating the acquisition of tangible resources (both during and after hospitalization) that the patient cannot acquire for himself (for example, employment, living accommodations, transportation, and so on).
2. Conducting an aftercare observation of the patient's reintegration into and progress within the community.
3. Providing casework counseling with individual patients during the course of hospitalization.
4. Initiating and providing casework counseling, if necessary, to members of the patient's family.
5. Providing information with respect to the patient's ongoing status to his family members.
6. Providing casework counseling with individual patients during aftercare in order to facilitate their integration into the community.
7. Obtaining information concerning the patient and his family members (transcribing social histories, interviewing the patient and/or his family in order to obtain pertinent data) and transmitting this information to relevant staff members.

STUDY SAMPLE

The sample used in the study consisted of 150 social work staff members in the social service departments of six New York State mental hospitals located in both rural and urban settings. These 150 persons represent employees classified according to the 10 social work position classifications of the New York State Department of Mental Hygiene's Social Work Career Ladder. The ten classifications were grouped into four classes of personnel: social work trainees, social work assistants, social workers, and social work supervisors. The demographic character-

[10] Barker and Briggs, op. cit.

istics for each class of personnel have been identified and organized to obtain position classification profiles, as follows.

Social Work Trainee (N = 25)

Sixty percent of the personnel in this class are 30 years of age or younger, and they are predominantly women (64 percent).[11] In terms of educational achievement, 88 percent have less than a bachelor's degree; none has less than a high school diploma.

They are relatively new to social work as a profeession and to their respective social service departments. Eighty-eight percent of the trainees have had less than 3 years of experience in the social welfare field, and 92 percent have been in their respective departments for less than 3 years. The trainees' reported future plans include predominantly two alternatives: staying in the present social service department (36 percent) or getting an MSW degree (36 percent).

Social Work Assistant (N = 58)

The social work assistant class represents the largest percentage of the entire sample (39 percent), and if this is representative of social service departments of State mental hospitals, this class represents the largest manpower pool available to provide social services. More than 66 percent of the members of this class are 30 years of age or less; however, a significant number are 41–50 years old (26 percent) or over 50 (12 percent). Thus this class of personnel is comprised of persons on both ends of the age continuum, with relatively few in the middle range. As in the trainee class, the social work assistants are predominantly women (60 percent).

Thirty-eight percent of the assistant class has three or fewer years of experience in the social work profession; however, 45 percent have at least 5 to 7 years of experience. Experience in their resepective social service deparements does not show this division, however, since 69 percent have been there less than 3 years, and only 22 percent have five to seven or more years of experience in their respective departments.

In terms of educational achievement, social work assistants have more formal education than trainees—62 percent have bachelor's degrees with some postgraduate credits; 28 percent have bachelor's degrees.

The expressed future plans of the social work assistants are similar to those of the trainees. Forty-one percent plan to stay in their present job and 43 percent plan to continue formal education in the pursuit of a graduate degree in social work.

In summary, the assistant class can be characterized as being predominantly women, having both young and older persons, either new to or experienced in social work, and with a predominantly post-baccalaureate educational background. As is the case with the trainee group, their future plans include either staying in their present positions or pursuing a graduate degree in social work.

[11] All percentages represent the closest approximation possible.

Social Worker (N = 38)

Sixty-one percent of the personnel in this class are 30 years of age or less, and the ratio of men to women is almost equal, 47 to 53 percent respectively. They have had more experience in social welfare than the previous two classes, but are quite similar in terms of their length of time in their respective social service departments. Fifty-eight percent have had 1 to 5 years of experience in social welfare and 21 percent have had over 7 years of experience. They are relatively new to their respective social service departments, however, since 79 percent have spent three or fewer years there. Their extent of educational achievement is clustered around the MSW dgree: 86 percent have this degree.

The respondents' future plans seem to indicate a desire to stay within their current social service departments. Sixty percent responded in this way.

In summary, the social worker class of personnel can be characterized as a young, experienced, and professionally trained group of persons with a graduate social work education, who would like to stay within their present social service departments.

Social Work Supervisor (N = 24)

Fifty percent of the personnel in this class are 41–50 years of age and 29 percent are over 50. They are predominantly women (75 percent).

This class represents the most experienced in the social work profession and in their respective social service departments. Seventy-nine percent have over 7 years of experience in social work, and 54 percent have over seven years of experience in their present social service department. Their level of educational attainment is also high: 63 percent have an MSW degree and 25 percent have post-graduate credits.

An overwhelming number—88 percent—responded that their future plans consisted of staying within their present position and social service department.

In summary, social work supervisors can be characterized as an older, predominantly female, highly experienced and trained group of persons with advanced education who plan to stay within their present social service departments.

RESULTS

In anticipating probable results of differentiation among the seven social work activities, it was hoped that these activities would cluster in several distinct categories on the basis of their complexity scores. However, analysis of the data showed only one of the activities to be significantly more complex than the others at the .05 level of significance. This was the determination and acquisition of concrete services (see Table 2). Needless to say, this was a rather unexpected finding for two reasons: (1) this type of activity has traditionally been assigned to baccalaureate-level practitioners and (2) has traditionally been

Table 2. Ranking, in Descending Order According to Degree of Complexity-Responsibility, of Social Work Activities by Social Work Position Classification

Activities	Median Rank	Psychiatric Social Work Trainee	Psychiatric Social Work Assistant	Psychiatric Social Worker	Psychiatric Social Work Supervisor
1. Determining the need for and facilitating and acquisition of tangible resources (both during and after hospitalization) that the patient cannot accomplish for himself (e.g., employment, living accommodations, transportation)	1	1	1	1	1
2. Conducting an aftercare observation of the patient's reintegration and progress in the community	2.25	2	2	2.5	4
3. Providing casework counseling with individual patients during the course of hospitalization	2.75	3	3	2.5	2
4. Initiating and providing casework counseling, if necessary, to members of the patient's family	4	4	4	5	5
5. Providing information with respect to the patient's ongoing status to his family members	5	5	6	4	5
6. Providing casework counseling with individual patients during aftercare in order to facilitate their integration into the community	6.75	6	5	7	6.5
7. Obtaining information concerning the patient and his family members (transcribing social histories, interviewing the patient and/or his family in order to obtain pertinent data) and transmitting this information to relevant staff members	6.75	7	7	6	6.5

Table 3. Ranking of the Dimensions of Complexity-Responsibility by Social Work Activity

Dimension of Complexity-Responsibility	Median Rank	Social Work Activity						
		1	2	3	4	5	6	7
Expressive requirements ...	1	1	1.5	3.5	1	1	1	2
Originality and initiative ..	2	3	1.5	2	2	2	3	1
Judgment	3.5	4	3	3.5	3	4	4	3
Contact with persons	4	5	4	1	4	5	5	4
Extent of independence ...	5	2	5	5	5	3	2	5

thought of as a relatively routine and entry-level assignment requiring little skill or competence on the part of the worker. The present findings seem clearly to refute this last assumption, since concrete services were found to be significantly more complex than such activities as casework counseling, aftercare evaluation, and so on.

The CRDM instrument's discriminatory ability was indeed encouraging, but perhaps the most significant attribute of the instrument was its ability to isolate the essential components of complexity-responsibility for each social work activity. Statistical analysis showed significant differences across dimensions *within the same activity*. This finding was strengthened by the fact that all personnel of the social service departments were consistent in their perceptions of the inherent level of complexity-responsibility of those activities tested (see Table 3). Thus for each activity tested, it was possible to identify a rank order of importance for each dimension as it contributes to the perception and successful performance of the activity.

Implications for Education

The implications of these dimensions for the education of social work personnel are that they identify practitioner behaviors and qualities that should be incorporated into an undergraduate social work curriculum. However, the mastery of these behaviors and qualities cannot occur only on the cognitive level. As Walter Kindelsperger states, learning must occur at three levels of interaction: (1) the intellectual level (formal seminars, knowledge base), (2) the vicarious level (simulated situations such as role-playing, discussions of situations in informal seminars, or watching a skilled worker perform an activity), and (3) the object presence level (which may be interpreted to mean the actual performance of the activity by the trainee under the supervision of a skilled worker).[12] It is apparent that only through a total learning experience utilizing resources within the undergraduate curriculum and/or within agency placements can social work manpower most effectively be educated.

Since the median ranking of the five dimensions across all activities was surprisingly consistent, it may tentatively be asserted that certain

[12] Walter L. Kindelsperger, "In-Service Staff Education," in George W. Magner and Thomas L. Briggs, eds., *Staff Development in Mental Health Services* (New York: National Association of Social Workers, 1966), pp. 27–28.

specific behaviors and qualities are more important for the performance of a given social service activity than any other criterion. If this is in fact the case, then it may prove more judicious to educate around specific behaviors and qualities than around the components of specific activities. The following discussion will suggest the nature of educational instruction that may best convey the dimensions of complexity-responsibility.

The most important dimension across all seven activities was expressive requirements (see Table 3). Since expressive requirements pertain to the worker's ability to communicate effectively in both verbal and written form, it would suggest a specific type of learning experience, for example, small informal groups in which brief lectures exploring the dynamics of human relations and communications are utilized, along with intensive participation and written exercises that enhance the appreciation of communications as an effective helping skill.

The second dimension, originality and initiative, suggests the development of a way of approaching the helping process and also a way of practicing social work. The originality facet implies a creative stance that could best be attempted in small informal groups in which the philosophy of creative thinking is explored through the presentation of brief lectures and supplemented by assignments that allow for and stimulate creative activities of social work interest. This approach seems to facilitate the plea of Lydia Rapoport to consider once again the "creative" or "artistic" components of social work practice. Some of her comments seem especially relevant to the topic of originality:

> Degree of intelligence in and of itself seems negligible, beyond a certain level. In fact, concepts of intelligence and talent are rather elusive ones and, as such, will not be discussed. More germane is the intellectual quality of openness and general receptivity to new information and ideas as well as a liking for complexity.[13]
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> The creative person has high tolerance for ambiguities. He does not seek premature closure but can maintain an openness toward the seemingly contradictory or obscure.[14]
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> A related problem to the danger of over-conceptualization is the trend toward over-integration or, more accurately, premature integration of knowledge.[15]

The facet of initiative seems to stem from a person's sense of competence; without some feeling of competence a person shies away from initiating different kinds of behaviors. With this consideration in mind, one approach would be to incorporate field experience into an undergraduate curriculum to acquaint and familiarize the student with social work practice.

The middle dimension, in terms of importance, is judgment. Imply-

[13] Lydia Rapoport, "Creativity in Social Work," *Smith College Studies in Social Work*, Vol. 38, No. 3 (June 1968), as reprinted in *Social Work Practice Work Book* (Syracuse: Syracuse University School of Social Work, 1969), p. 72.
[14] Ibid.
[15] Ibid. p. 78.

ing a decisionmaking or problem-solving process, this dimension may be enhanced in an undergraduate curriculum by the presentation of various real or simulated situations requiring a decisionmaking process. Through analysis of the decisions made and their ramifications with respect to subsequent decisions, the student could gain an appreciation of the problem-solving approach.

The fourth dimension, contact with persons, is quite similar to expressive requirements, except that it is concerned with the intensiveness of interpersonal relationships. Thus the need to communicate effectively is coupled with the need to be able to handle intense working or nonworking relations with others. With this in mind, it would seem that small informal groups exposed to human dynamics theory and exercises could be supplemented by sensitivity training that would enable the student to appreciate more fully the effects of his behavior on others.

The fifth dimension, extent of independence, may be enhanced by encouraging autonomous thought and action with a minimum of direct supervision by simulated role-playing situations in small informal groups. The small, informal groups could also be supplemented by a field experience in which "tight" supervision could be minimized.

In summary, we have attempted to report on the complexity-responsibility inherent in seven social work activities within the realm of the baccalaureate-level social worker and the component dimensions within these activities. The relationship between these components and potential educational experiences may contribute to the development of those dimensions. Hence it would seem that a generic approach at the undergraduate level—focusing on desirable practitioner behavior and qualities—may be more effective for future service delivery than the teaching of specific job skills.

Part Eight

CONCLUSION

RESEARCH FINDINGS RELATED TO THE EDUCATION OF BACCALAUREATE SOCIAL WORKERS

Robert L. Barker [1]

The studies that have been reported in this volume by no means reveal everything one needs to know in order to prepare social workers better at the undergraduate level, but they provide much more information than would be available had they not been undertaken. It seems useful at this point to review what findings were obtained, consider what observations were made that could eventually point to needed facts, and look at the questions that went unanswered. It also seems useful to interpret the findings as they might apply to the goal of better undergraduate education for social workers who go no further in their academic training.

The studies and field demonstrations took place at approximately the same time (1963–70), independently of one another, and in a variety of different settings. Those summarized here took place in a public welfare agency, a private child welfare and foster agency, a state mental hospital, a group of selected family service agencies, and Veterans Administration general and neuropsychiatric hospitals. All were conceived and implemented at a time when there was great concern about the growing need for social services and the realization that there was a lack of the necessary MSW manpower to meet those needs. The studies were, in part, born out of the need to find ways of meeting social service needs through personnel and organizational changes. They all attempted to study how best to utilize social work personnel without master's degrees. The goal was to assign to baccalaureate social workers (BSW's) responsibilities that were of a more professional nature and to determine what they could and could not do. In other words, all the studies attempted to shed

[1] The author has based this report on the material contained in the previous chapters of this volume as well as on the major research documents that are only summarized here. Except where specifically indicated, the interpretations made in this chapter are Dr. Baker's and not necessarily those of the researchers of the various studies.

light on the kinds of activities that the BSW's could perform under the right conditions and to depict what those conditions are.

MAJOR FINDINGS

Ten major findings that seemed to have specific reference to undergraduate social work education clearly emerged from these studies. These findings are not necessarily described in lengthy detail in the papers in this volume, but are found in the larger reports of which these papers are summaries.

1. *The social work team is the best known approach to effective utilization of non-MSW personnel.*

All the projects made extensive use of the social work team approach. Composition of teams varied from two members, as in the Family Service Association of America study, to as many as eight, as in the Connecticut Valley State Hospital demonstration. At the outset most of the studies did not set out to use staff members in team clusters, but experimentation seemed inevitably to lead to that.

The teams were always led by MSW workers and their members consisted primarily of non-MSW personnel. The relationship between the leader and other team members typically combined elements of both supervisory and organizational hierarchies. The workers—and the team leaders, for that matter—were rather uneasy about this relationship at first and tended to think of themselves as working independently with their clients long after the team operation was in full effect. Identification of workers as part of a team was eventually accomplished in all cases, however, and when it occurred the efficacy of the team was conclusively demonstrated. For example, findings from the Midway and FSAA studies showed that qualitative and quantitative improvements in service delivery were closely related to the way the workers related to their peers and work associates.

In the atmosphere of greater personal congeniality and less severe lines of authority and responsibility that generally forms among team members, productivity is enhanced. Furthermore, teamwork leads to provision of a wider range of services for clients than would otherwise have been possible, a fact especially shown in the VA and Detroit child welfare agency projects. The team provides services that are qualitatively and quantitatively greater than the sum of its parts. It seems clear, therefore, that much attention should be given by undergraduate social work educators to this fact. Considerable training as to the operation and practice of the social work team and how its members function together should be built into undergraduate programs.

2. *The assignment of cases to workers or teams is less effective than the assignment of activities or goals.*

The traditional approach to social service delivery has been to give an individual worker responsibility for meeting all the social service needs of the client or case. Most of the field demonstrations showed that such a manner of assigning work presented too many problems. One person—especially one without extensive academic social work training—could not meet *all* the social service needs of an individual. The

studies all sought alternative approaches so that instead of one person being responsible for all aspects of the helping process, the client was "divided" into many parts, each of which was assigned to different workers. One worker, for example, might deal with the client's need for emotional support while another might help him obtain needed funds or employment.

In most of the studies the workers were assigned clusters of tasks. These were called "episodes of service" in the Midway and NASW studies and simply "tasks" in other projects. The workers often found it difficult to think in such terms and there was much concern about partializing the client and failing to consider the "whole person." However, as they became more familiar with this modality, they generally felt they were able to provide more and better services this way.

Undergraduate educators should look into this approach carefully and find ways of teaching it. The traditional approach in which the worker is taught to feel solely responsible for all the social service needs of a case is badly in need of revision. Teaching the student how to perform a certain kind of activity with many different clients is more in keeping with the findings of the research reported here. Curriculum planners should consider ways of implementing this approach so that in addition to providing students with a liberal arts foundation, they might also be trained to become specialists in working with one or a few aspects of a client's problem rather than trying to be all things to all people.

3. *BSW's were much more capable of providing quality work and effective service than was formerly believed possible.*

When most of the projects got under way, the prevailing belief held by social agency administrators and professional workers themselves was that BSW's could do perhaps a "little more" than they had been permitted to do, but only with careful supervision. At the outset several of the researchers reflected this cautious, conservative view. In the VA study, for example, the introduction of BSW's into the social service system was tentative and at first the tasks given to them were routine and simple. As they continued to prove themselves, the workers were given more demanding assignments.

During the course of the various other demonstrations, the BSW's were given gradually increased responsibilities until it became evident that they could do much more than most people had expected. The main limits on their work seemed to be limits either imposed on them by their team leaders or self-imposed because of felt inadequacies. Pressures on the workers from other, usually older, workers had served to keep them performing below their capabilities. This was revealed clearly in the Midway study, which showed that the younger, less experienced, non-social work career-oriented male workers were highly productive to begin with, but became less so as they remained on their jobs. The implication is that the low expectations made of BSWs may be a self-fulfilling prophecy. This state of affairs need not exist if more confidence is placed in the workers. Undergraduate social

work educators need to be mindful of the importance of teaching students that they do have many capabilities, the opinions of their older colleagues with higher credentials notwithstanding.

4. *BSW's were more involved in "more important" and more direct service activities than MSWs.*

Most of the projects used some outcome criteria and scales to measure different social work activities. The activities were explicated, ranked in order of importance as social work functions, and evaluated as direct or indirect services. Several studies found that the activities that were ranked most important and most difficult to accomplish—in fact the ones that seemed to require more training—were being done more by BSW's than by MSW's. The Johnson-Lebowitz project shows how some types of activities may be measured and suggests that many of these activities are well within the realm of the BSW's responsibility.

The Connecticut Valley study suggested that the reason for this state of affairs is that MSW's have more control over their jobs. In that hospital they tended to choose those activities that could be accomplished in an office interview situation and that had more chance of success. For example, the VA studies showed how important—but complicated—was the function of mediating for clients between various members of the bureaucratic system to meet their needs better; this function was predominantly taken on by BSW's. If one of the rewards of moving up in the social service hierarchy is being able to avoid the less rewarding tasks, then undergraduate training should give considerable emphasis to equipping students for some of the less pleasant tasks. Of course, with the social work team approach the distinction among the jobs accomplished by various levels of personnel will not be nearly so great.

5. *MSW's were involved more in directing than in providing service.*

All studies, but especially the VA and the Catholic Charities projects, strongly pointed out that the BSW will be the doer while the MSW will be the director of social work tasks of the future. These studies showed that the most successful utilization of MSW's who work with BSWs seemed to revolve around their decisionmaking activities at critical points. The Midway project showed how MSW supervisors of BSW's wanted their workers to have more training in "understanding," while non-MSW supervisors were more concerned with delivery. The undergraduate educator would probably do well to devise ways of teaching methodology, technique, and procedures for providing social services if the BSW is going to be more interested in service delivery than his MSW colleague.

6. *BSW's tended to work outside the agency more than did MSW's.*

Just as the MSW's were more involved in directing rather than providing services, the BSW's tended to work in the field—working with the client in the client's environment—to a greater extent than did MSW's. The VA, NASW, and Catholic Charities projects dealt extensively with this phenomenon. They reported that the BSW could work in a variety of settings other than inside the agency, and that when he did so the results were good. Educators who tend to teach

workers how to provide service only in the agency context might well consider how to get this alternative approach across to aspiring undergraduate social workers.

7. BSW's acquire areas of unique expertise on their own.

As members of social work teams, the BSW's in several studies found they could explore newer ways of fulfilling agency goals. Given wider latitude and greater responsibility, the BSWs often became individual specialists in some phase of the team activity. While many role assignments for BSW's could be in uniquely specialized areas, many other activities were not built into job descriptions or even anticipated by the administrators, but proved to be valuable additions to the service delivery program anyway. For example, in the Connecticut Valley study, some BSW team members became quite proficient in helping clients acquire jobs and homes following release from the hospital. They took on these additional responsibilities, acquired primarily through trial-and-error approaches, which added substantially to the range and quality of the social service program.

The NASW study, which showed that the younger, less social work-oriented personnel were more imaginative in finding new ways of meeting client needs suggests something else for the undergraduate educator. An approach should be devised in which students, and later BSW's, are rewarded for seeking new ways of providing services, instead of being subtly pressured against innovation. BSW's should be encouraged, as they were in the field demonstrations reported here, to seek ways of innovating. As several researchers have indicated, the undergraduate curriculum should avoid, at almost any cost, the static entrenched form of teaching an approach that may later be found less adequate than another.

8. Turnover was relatively low and morale was high among BSW's when opportunities for responsible activity were present.

A recurrent problem in approaches to social service delivery has been that of maintaining service levels despite a high rate of personnel turnover. An outcome of several of the studies, especially the NASW and FSAA projects, was that there was a much lower rate of personnel change and generally high morale among the personnel. The Midway project challenged the assumption that high morale was always translated into high productivity, however.

The high morale among the workers could have been attributed to the Hawthorne Effect, in which workers who are being scrutinized for study purposes tend to be more productive than the changes in their environment would indicate. But the NASW study correlated high morale with the team approach, in which workers had goals to accomplish for the group rather than for themselves alone. This is consistent with the Midway assertion that morale is associated more with peer group relationships than personnel conditions. Most of the studies reported an increase in the retention of workers, both BSWs and MSWs, and the reasons given went beyond the Hawthorne Effect. They reported that turnover was low because BSW's were considered fully responsible persons and were given constant challenges and more

status, and because MSWs enjoyed greater responsibility working through the team approach.

9. *In-service training programs are no substitute for academic education.*

Formal training of the undergraduate social worker is of crucial importance because the possibility of good in-service training in social agencies is sorely lacking. It is often suggested that the undergraduate program will be only a preview of the training that the worker will receive on the job. The facts obtained in these demonstrations do not bear this out.

On the contrary, the projects uniformly attempt to provide extensive in-service training for BSWs and were brought face to face with the realities of the problems surrounding these efforts. Even with researchers doing everything they could to provide on-the-job training, there were many pressures that kept the programs from accomplishing all they were set up to do. The Midway project explicitly stated that, in public welfare at least, the everyday work situation severely limits a worker's opportunity to build upon his education on the job. In other words, it seems that what training a BSW is really going to get will have to come from the undergraduate social work department.

10. *BSW's were generally regarded as being in a transitional phase of their careers.*

With the exception of the FSAA study, all the projects used younger, less experienced BSW's in their inquiries. Most of the female BSW's were planning on eventual marriage and a homemaking career. Further education either in social work or in other fields was also a prominent plan. Often BSW's were not involved in social service activity to the same extent that career workers might be. This is not to say that they were unconcerned or less productive. The Midway project showed that they are probably just as concerned as and even more productive than career workers. But they considered themselves and were considered by others as holding the job temporarily, gaining experience, passing time, supplementing income needs, or the like. Baccalaureate-level personnel will always be needed in social work, and for the field to be dependent on "transients" to hold such important positions is intolerable. The goal should be that of making the bachelor's degree in social work an end in itself. The pressures to leave the field or to get more social work education would not exist if the undergraduate training program fulfilled its promise of properly preparing the worker to assume professional responsibilities.

CONCLUSION

These ten findings are obviously only suggestive of the myriad others that are relevant to the undergraduate social work educator. Each study contains many more findings, and the conclusions that each reached contain much that is of value to the undergraduate educator. The studies give many insights into the kinds of activities that BSW's will be called on to do and for which they will need training. The projects demonstrate some of the knowledge workers must have if they are to do their job effectively. They answer a few of the many questions that

were posed in the introduction to this volume and give hints about how and where to find the rest of the answers.

All of these papers were presented before the first Syracuse University Curriculum Building Workshop for Undergraduate Social Work Education on October 8-11, 1969. Out of that meeting a series of task forces were established, one of which was given the assignment of preparing a statement for the whole body, a statement that would indicate the kind of behaviors of which BSW's would need to be capable in order to fulfill a professional role consistently. It was assumed at the same time that such a statement could be helpful to curriculum planners in keeping their educational goals relevant to the activities performed and the demands for activities that are actually made in the field. This report, prepared for the task force by Dorothy Bird Daly and presented next, should be carefully considered by those who wish to build undergraduate social work curricula in a relevant and meaningful way.

Epilogue

EDUCATING THE UNDERGRADUATE FOR PROFESSIONAL SOCIAL WORK ROLES

Dorothy Bird Daly [1]

Several developments in the social work profession, in social work education, and in the field of social welfare occurred during the relatively brief life of the Syracuse University Curriculum Building Workshop for Undergraduate Social Work Education that affected and served to define the milieu within which the Task Force on Manpower Utilization carried out its task.

DEVELOPMENTS IN THE PROFESSION

Primary among changes that have taken place in the profession are these:

1. The action of the Board of Directors of the National Association of Social Workers on February 12, 1970, in response to the mandate of the NASW Delegate Assembly to modify the base of membership in the Association. Since its founding in 1955, except for charter members who were eligible on the basis of their membership in predecessor organizations, entry into NASW has been limited to persons holding at least a master's degree in social work. Under the revised statutes, membership is now open to persons holding a baccalaureate degree, under specified conditions. These are, in general, that a person is eligible for regular membership if he holds a baccalaureate degree resulting from completion of an undergraduate program in social work that meets criteria determined by the Council on Social Work Education. He is eligible for associate membership if he holds a baccalaureate degree in any field and is employed in a social work capacity, as defined by NASW. After 2 years of associate membership, a person becomes eligible for regular membership provided he continues to be employed in a social work capacity and completes under academic auspices, graduate or under-

[1] This is a report of the Task Force on Manpower Utilization of the Syracuse University Curriculum Building Workshop for Undergraduate Social Work Education. Members of the Task Force were: Fred Wight, Chairman; Mary R. Baker; Dr. Robert L. Barker; Thomas L. Briggs; Mrs. Dorothy Daly; Margaret Daniel; Margaret Hoffman; Mrs. Virginia Karl; Dr. Thomas P. Melican; and Leonore Rivesman. Dorothy Bird Daly, MSW, is Dean, School of Social Work, Catholic University of America, Washington, D.C.

graduate, specific educational experiences that are defined by the institution as equivalent to an undergraduate social work program, according to CSWE standards.

2. A second development was the action by the Board of Directors of CSWE on April 16, 1970, to establish new standards of eligibility for constituent membership in the Council of universities and colleges offering an undergraduate program in social work. In general, the criteria require that the institution fulfill the following:

a. Be accredited for four or more years of college work leading to the baccalaureate or higher degree by its regional accrediting association.

b. Provide a broad liberal base of education with content in the areas specified in the CSWE guide (*Undergraduate Programs in Social Welfare* [67–9–33], pp. 7–10).

c. Have a written statement of the educational objectives of the program consistent with the values and purposes of the social work profession, and identify and describe the program in its publishing catalog.

d. Indicate on the student's transcript or diploma or otherwise certify that he has completed a program in social work.

e. Certify only those students who have satisfactorily completed a cohesive sequence of courses in the social work program, including an appropriate educationally directed field experience with direct engagement in service activities as an integral part of that program.

f. Place responsibility for administration of the program with a full-time faculty member, include as a full-time faculty member at least one person with at least a master's degree in social work, and ensure that the content on social work practice theory and skill development is taught by a faculty member with at least a master's degree in social work.

Further, the CSWE board has charged the Special Committee on Undergraduate Education with defining acceptable equivalents to an undergraduate social work program for baccalaureate social workers (BSW's) whose undergraduate education was in another discipline or academic area and who are planning to work at the first level of practice in social work.

DEVELOPMENTS IN SOCIAL WELFARE

Turning now to the field of social welfare, developments have been so many, so conflicting, and so rapid that the task force members agreed that even were they able to gain possession of the fulcrum that would enable them to move the world of social work to effective manpower utilization they still would not be able to find firm ground on which to stand in order to do so. To highlight some aspects of change, consider the following:

1. The number and range of research and demonstration projects that have been launched during the recent past focused on testing the efficacy of utilizing BSW and technical and supporting personnel. Only some of these projects have been reported in this volume. The results of these activities and their affirmation of the value and effectiveness of

BSW's had a profound impact on the thinking and the sometimes long-cherished opinions of task force members.

2. Another major development in the field is the work on functional task analysis[2] under way in both NASW and the Social and Rehabilitation Service of the U.S. Department of Health, Education, and Welfare, which while incomplete provides a theoretical construct on which to approach delineation of tasks in social welfare requiring differential levels of knowledge, skill, and responsibility or autonomy and hence differential levels of preparative education.[3]

3. One aspect of the social welfare field that created great problems for the Task Force on Manpower Utilization was the shifting, quicksand base of supply-demand projections. This can hardly be described and should not be classified as a development of the field, because it is more accurately a "nondevelopment" or regression. It is nevertheless an important characteristic of the milieu.

Consideration of the relationships between undergraduate social work education planning and development and effective manpower utilization was greatly hampered by lack of data on either supply or demand. It simply is not known, nor can it be discovered, how many social workers are now employed, how many are available but not needed, and what the projection of demand five or ten years hence might be. How this demand will be allocated among social workers with doctoral degrees, master's degrees, and baccalaureate degrees cannot even be guessed at under present conditions. The most recent comprehensive data for the field as a whole are in a 1960 study of manpower in social welfare and the partial approach in the Department of HEW manpower report, which was based on data collected no later than 1964.[4]

Data exist on the current membership of NASW, on numbers of graduates of accredited graduate schools of social work, and on graduates of undergraduate programs (in this last case, only partial). There are some projections and current data in the field of mental health. But the lack of comprehensive hard data on manpower supply and demand and on how social workers are being utilized was a critical problem impeding the work of this task force.

Demand and supply projects are basic to a manpower program.

> Although it is generally recognized that "by no method so far attempted can we predict supply or demand over a sufficient period of time with sufficient accuracy for it to be useful as the single base of manpower planning," such data are nevertheless a necessary part of the base on which to build a manpower

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[2] Jean K. Szaloczi, *Application of Functional Job Analysis to Social Welfare* (Las Vegas: American Personnel and Guidance Association, April 1969).

[3] Dorothy Bird Daly, "Manpower Planning: Dimension of Social Administration," *The Catholic Charities Review*, Vol. 14, No. 5 (May 1970), (Washington, D.C.: National Conference of Catholic Charities), pp. 12–21.

[4] *Salaries and Working Conditions of Social Welfare Manpower in 1960* (New York: National Assembly for Social Policy & Development, 1961); Dorothy Bird Daly, *Closing the Gap*, Report of the Departmental Task Force on Social Work Education and Manpower (Washington, D.C.: U.S. Department of Health, Education & Welfare, 1965).

development system. In fact, one of the reasons for their inaccuracy over the long haul is a result of their very usefulness.

Supply-demand data are used to make political, social, and technical decisions which cause developments that by their very effectiveness deflect the trend and make the projections wrong. We are constantly changing jobs to fit the people available and changing people to fit the tasks needing accomplishment.

Also supply helps to determine demand. As the skill of the practitioners in a particular field improves and as significant new knowledge in a field increases, demand for services increases and with it occurs increased demand for personnel. Supply-demand data are subject to continuous change. They are imprecise and uncontrollable.

But acknowledging all these limitations, there is, nevertheless, need for an organized method for determining the supply-demand size and ratio. Data should be kept current to provide information on location and types of job openings, occupational classification of these openings and forecasts of trends in demand and supply.

In the field of social welfare we have no such system. What information there is, is partial, fragmented and additive. Most important, we aren't even sure what manpower to count, due to our lack of an institutionalized concept of the social welfare field.[5]

This, then, was the shifting backdrop against which manpower utilization problems were studied in relation to their impact on undergraduate social work education and against which undergraduate curriculum was studied as contributing to better, more effective utilization of manpower in the field.

PURPOSE OF THE TASK FORCE

The logic of having a Task Force on Manpower Utilization in connection with an effort to develop a model for curriculum-building is not immediately apparent, since at first glance they appear to be separate concerns of two quite distinct systems, or subsystems if you will, in social welfare—the education system and the service delivery system. The immediate response of educators—and even on the part of some of the members of the task force themselves—to the presence of this task force on the project was one of doubt and confusion concerning its relevance and importance. The leaders of this endeavor, however, were consistent in their recognition of the importance of considering manpower utilization to be an essential aspect of planning undergraduate social work curricula. The task force itself spent long hours in intensive and sometimes heated discussion to clarify its charge and scope of responsibility, but, like the project planners, eventually recognized the importance of the task of considering the interrelationships between the effective utilization of manpower and the educational preparation of that manpower.

Interdependence of All Parts of the System

This conviction was partially the product of earlier work done under the sponsorship of the National Commission for Social Work Careers in a 1967 workshop on social work manpower at Arden House. During that workshop the value of systems theory and the importance of taking

[5] Dorothy Bird Daly, "New Ways and New Potentials for Social Work Manpower Development," *1968 Annual Review* (New York: National Commission for Social Work Careers, 1968), p. 15.

a systems approach to manpower development were identified and explicated. In the report of the conference the following statement was made:

> Taking a systems approach to manpower development means that we view it as a subsystem of the larger social welfare system and as an interlocking system with other subsystems within the field—with the professional organizations, social work education, and the network for social agencies—and as an interlocking system, also, with other systems outside the social welfare field—the Employment Service, the Civil Service, the general educational system, the Health and Medical Care system, and the Law Enforcement system, among others. Acceptance of this concept requires that we give up piece meal attempts at solution of the complex manpower problem and identify all the components of the function as a prelude to planning, even though in actual operation the several elements may be administered separately and autonomously.[6]

In this same report the complex interrelationships and interdependencies that exist among all the components of the social welfare system were developed. The point was made that segments of the field can no longer take unilateral action that serves an immediate purpose but defeats the other equally important purposes of related activities. The greatest value of applying systems theory to any complex endeavor derives from the hypothesis that in any system change in one aspect of the system cannot occur without consequent changes in every other part. The objectives of a manpower development system in social welfare are to ensure provision of high-quality preventive, sustaining, and rehabilitative social services to all in need and to facilitate economy, efficiency, and effectiveness in the delivery of such services. These objectives are common to all parts of the system, including professional education and service delivery.

Applying these concepts to the development of curricula for undergraduate social work education forces us to recognize an immediate complicating problem—that the undergraduate program in social work lodged in a liberal arts college and often in a still larger university system is often identified as a subsystem of two larger systems—the educational system itself and the social welfare system. In defining its goals, specific objectives, program content, and the organizational structure to be established to pursue this content and achieve its objectives, it must take into account the larger objectives and ultimate goals of both the educational system and the social welfare system. This means that, Janus-like, it must face and seek to achieve the goals of the liberal arts effort to develop the individual as a complete, cultured person, while on the other side facing realistically the needs of the social welfare system for qualified manpower. In general these goals are compatible and mutually supportive. When it comes to the allocation of resources and the division of time both from the viewpoint of the student and the institution, however, there are inevitable tensions and conflicts.

Concern with Output

At a recent discussion of a proposed national study on the costs of social work education the opinion was expressed—and well defended—

[6] Ibid., p. 14.

that increasingly there are indicators that society is moving in the direction of holding educational institutions at all levels accountable for their efficiency and effectiveness.[7] Educational institutions are being evaluated in relation to their production processes rather than accepted and supported as desirable societal luxuries. This trend seems to be especially evident in relation to those programs on which society is dependent for production of necessary scarce manpower for social purposes. Hence to plan objectives for undergraduate social work education, to develop a curriculum, to structure the learning experiences without relation to the product—that is, to be concerned only with the input and to disregard the desired output—would leave educators without the means of evaluating or justifying the program.

The other four task forces working on the Syracuse University project were concerned with inputs to the system. The manpower task force was concerned mainly with output, with the product of the system. The output sought from undergraduate social work education programs is, among others, graduates with a broad base of culture and equipped for the first level of professional practice of social work.

Developing a Model of the BSW

The manpower task force labored long and hard to fulfill its charge through a task definition approach, to determine either in general terms or with a high degree of specificity what tasks could and should be performed by the BSW as distinct from tasks that should be reserved exclusively for the social worker with an advanced level of education. It found that practice in general, controlled demonstration, and evaluative research had not yet succeeded in this endeavor, and that without data from such sources the task force could not follow this path. The fact is that such data as were available weighted the balance in the other direction—pointing up the inconclusiveness of measurements of relative effectiveness of BSW's and MSW's. Further exchange among the task force members led to the conclusion that the greatest value for the field would be to define the product of undergraduate programs in terms of the expected qualities, characteristics, attributes, and behaviors of the person entering the field at this educational level. It then becomes the task of each agency to determine for what part of its function these practitioners can be given responsibility.

The task force then addressed itself to developing a model of what a BSW is and what can be expected of him if he is a product of an undergraduate educational program. It is necessary to distinguish between the idea of what output the undergraduate curriculum is directed toward as an objective and what a given graduate may be able to achieve or what a given situation may demand of him. The model to be presented here simply describes what the student can expect of himself as a qualified graduate of such a program and what the field has a right to expect of him.

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[7] Cooper and Company, *The Cost and Output of Graduate Social Work Education: An Exploratory Study* (Washington, D.C.: Social and Rehabilitation Service, U.S. Department of Health, Education & Welfare, 1970).

In certain circumstances (depending on the resources within the individual, the challenge to which he responds, and his subsequent learning and development) he may be called on to perform at a much higher level of responsibility, autonomy, and skill than would normally be expected of him—and do so successfully. Unfortunately, though, in the presence of inhibiting constraints his potential may atrophy, his dependence on structure and supervision may increase, and his capacity to be of service to people in need, to effect social and institutional change may decrease. The model presented here describes the desired product. The tasks he is assigned or generates for himself—whether he exceeds or fails to encompass this model—is a function of both the worker and the setting in which he works as they interact with each other.

The work of the task force was greatly facilitated by the reports and analyses of the research and demonstration projects in manpower utilization that were the subjects of the first meeting of the group. A weakness of the research to date for the purposes of this task force is that in no instance did the demonstrators differentiate between the graduate of a fully developed undergraduate program in social work and the graduate with an undifferentiated liberal arts or other background. In fact, in some instances the researchers did not differentiate between use of the worker with a baccalaureate degree and those with lower levels of education. Nevertheless, the research did establish that social work practitioners at the baccalaureate level and below were performing effectively in the provision of social services and in activities directed toward social systems change. Their work and its effectiveness were evaluated under the careful scrutiny of competent researchers and gave valuable data for use by the task force.

These projects established also that through the use of such personnel more people were reached with a wider variety of services and the agencies became responsive to a wider range of needs. Another significant result of the research already accomplished is that a range of social work manpower is being used and can be used effectively in a variety of settings—services to families and children, health settings, correctional settings, and community action programs—regardless of the auspices.

THE BACCALAUREATE SOCIAL WORKER: A PROPOSED MODEL

Profile of the BSW

The graduate of the ideal undergraduate social work program is prepared to function in direct service on his own initiative, not merely as an auxiliary, associate, or technician. He is capable of assuming complete and ultimate responsibility for his own working behavior. His competence is not limited to a single field for which he has been specifically prepared, but is transferable either in an established social service delivery system or in an organized approach to effecting change in the social system or in the development of new systems of needed services. The graduate will have learned and incorporated the purpose, values, knowledge base, and systematized method of social work and will understand the sanctions accorded it by society, sufficient to perform at

the level described later, as a function also of his understanding and knowledge of people in general and specific groups in particular, as well as his understanding of himself and the effect he has on people in an interactional dynamism.

Expectations of the BSW

Within this context, the BSW should be able to do the following:

1. Recognize and work within the purpose and structure of an agency or the goals and constraints of a given setting and hold himself accountable for completion of specific assignments within his own competence.
2. Establish rapport with clients from various cultures, with varying needs, dispositions, levels of emotional stability, and intellectual levels.
3. Communicate with people in a way that will enable them to begin to identify their needs, concerns, situational realities, and distortions and identify alternatives of behavior that are open to them, and help the client to see that he both influences and is influenced by his environment.
4. Help clients and community groups to mobilize resources of their own that will enable them to cope effectively with, overcome, and prevent problems, by using the supporting relationships, providing information, and clarifying the problem.
5. Involve and work with significant others in service provision as indicated.
6. Consider the effectiveness of the services provided in relation to client needs and to their effect on client situations, in order to recognize when the agency program and operation are not sufficiently effective. He knows how to bring this to the attention of the agency appropriately in order to begin the process of changing and improving the program. This involves the ability to relate to the respective agency staff in a facilitating manner.
7. Consult with peers and supervisors as well as with staff members with less education to gain a better understanding of client situations and modify his mode of intervention as appropriate alternatives are developed.
8. Impart information and instruct in certain areas, especially those having to do with the provision of concrete services, identification and use of resources, and means of negotiating complicated systems.
9. Synthesize related experience and arrive at meaningful generalities that will enable him to participate in the development of interventive strategies.
10. Function within an interdisciplinary framework entailing a knowledge of the role and appreciation of the functions of disciplines other than social work.
11. Make use of direct consultation with an MSW in order to establish a social diagnosis, make decisions of a critical nature, and determine appropriate treatment modes.
12. Except in those agency situations in which the agency's program has been so structured that the whole service delivery system for that particular program does not require functions that he is not prepared to perform independently, he will work as a member of a service team

or function under the general direction of and with regular consultation from an MSW.

The Practice Situation

In practice the BSW will be working with people directly, in the field and in the agency: individuals, families, groups of task-oriented community representatives. He will work in the community reaching out to the client group as well as working directly with other agency and community representatives in community efforts directed toward social system change. Generally he will be part of a team performing tasks within his area of competence that are a part of the total job to be done with the individual or the group and will be coordinating his work with the remainder of the agency team, members of which will be from within the field of social work as well as from other disciplines.

He will be accountable both to the team and to the client. He will deal with adults and children, with the aged and the disabled, and with the sick. He will work in a milieu of many conflicting value systems. He will deal with clients and groups who are vocal, aggressive, even overtly hostile, aware of their rights, rejecting, or demanding.[8]

Summary

In general the BSW will be used in the gathering and ordering of knowledge on which a social diagnosis and treatment plan can be based. He will be utilized in establishing and maintaining the relationship of mutual trust necessary for effective interventive action and service provision. He will participate in but not take final responsibility for identifying the problem presented and establishing the appropriate method and level of intervention and service provision. He will carry full responsibility for continuing service when the determined level of intervention is within his competence and may participate in service provision along with the MSW in more complicated situations. He will be in regular communication with his team leader or consultant as new information or changing situations alter either the diagnosis or the preferred method of intervention, moving in and out of the situation as the focus of the episode of service changes.

These, then, are the anticipated characteristics, qualities and behaviors that can be expected of the graduate of a curriculum in social work at the baccalaureate level. With experience, some may exceed these expectations and their performance may indeed be indistinguishable from that of the worker with advanced education.

UNRESOLVED ISSUES

The manpower task force addressed itself to the development of a model of how a BSW can be used if he is the product of an undergraduate social work program as proposed. It also explored some of the implications for the service delivery system and for graduate social work education, and finally directed its attention briefly to identifying some of the still unresolved problems. As noted earlier, its work was greatly

[8] Ruth C. Argento, "Behavioral Expectations As Perceived by Employing Agencies," *Public Welfare*, Vol. 28, No. 2, April 1970.

facilitated by the reports and analyses of the research and demonstration projects in manpower utilization that were the subject of the first meeting of the project group.

The first serious issue emerged from the previously stated weakness in all of the research to date—the fact that in no instance did the researchers differentiate between the graduate of a fully developed, quality undergraduate program in social work and the graduate with an undifferentiated undergraduate base.

A second issue emerged from recognition that adequate educational preparation is only the beginning of equipping the BSW for practice. The extent to which agencies are ready to utilize optimally the knowledge, skills, and competence of the BSW is as important as the preparation for practice they receive in the undergraduate program. Optimum use of the BSW can only be achieved as one segment of the total agency personnel plan and his work assigned in relation to all other levels of staff needed to fulfill service functions. It is therefore essential that agencies determine the level of difficulty of the functions or tasks essential to accomplishing the service goals of the organization, identify what level of educational preparation is required to carry out these functions, and prescribe what additional content must be provided through in-service training to prepare persons for practice in specific agencies.

Finally, job descriptions, minimum qualifications, staff development opportunities, career ladder designs, and salary schedules must all be given consideration in a comprehensive manpower plan if all levels of personnel are to be utilized effectively and the service goals accomplished. Many agencies may need consultation and help from specialists in job analysis, job design, and systems analysis to achieve these minimal conditions for proper utilization. Further, public agencies will need to work closely with merit systems to bring about the necessary changes in classifications, salary schedules, and related personnel practice.

CONCLUSION

At the beginning of this report it was posited that the undergraduate social work educator would be held responsible by the educational system for the development of a broadly cultured graduate and by the social welfare system for the production of qualified manpower for this level of service. It is hoped that in the product model developed here both goals interrelate compatibly and prove to be mutually reinforcing.

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